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UNITED STATES TARIFF COMMISSION
Washington, D. C.

# TRADE AGREEMENT DIGESTS

## Volume III

# METALS AND MANUFACTURES

Part 2

(This volume is in three parts. Part 1 includes digests on items provided for in paragraphs 301 to 328, inclusive, of Schedule 3 of the Tariff Act of 1930, which are listed for consideration in the proposed negotiations; Part 2 includes digests on listed items provided for in paragraphs 329-371, inclusive; and Part 3 includes digests on listed items provided for in paragraph 372 and the following paragraphs in Schedule 3 and digests on related items in the free list which are subject to import-excise taxes.)

Prepared by the Tariff Commission for use in connection with trade agreement negotiations

November 1946

List of Volumes in this Series

Volume I - Chemicals, Oils, and Paints

Volume II - Earths, Earthenware, and Glassware

Volume III - Metals and Manufactures

Volume IV - Wood and Manufactures

Volume V - Sugar, Molasses, and Manufactures

Volume VI - Tobacco and Manufactures

Volume VII - Agricultural Products and Provisions

Volume VIII - Spirits, Wines, and Other Beverages

Volume IX - Cotton Manufactures

Volume X - Flax, Hemp, Jute, and Manufactures

Volume XI - Wool and Manufactures

Volume XII - Silk Manufactures

Volume XIII - Manufactures of Rayon or Other Synthetic Textile

Volume XIV - Papers and Books

Volume XV - Sundries

Volume XVI - Free List

*(Some of these volumes will be published in two or more parts)*

337
Un38trd
v. 3
pt. 2

Contents


| Tariff paragraph | Title of Digest | Page |
|---|---|---|
| 329 | Chains, other than power transmission--- | 1 |
| 329 | Power-transmission chains---------- | 3 |
| 330 | Bolts, nuts, washers, and blanks of iron or steel---------- | 5 |
| 331 | Nails, tacks, brads, spikes, and staples (includes wire nails, cut nails and spikes, horseshoe nails, upholsterers' nails and thumbtacks, chair glides, etc.)-------- | 7 |
| 332 | Rivets, studs, and steel points--------- | 11 |
| 335 | Grit, shot, and sand of iron or steel--- | 13 |
| 336 | Corset clasps, and corset and dress steels | 14 |
| 337 | Card clothing---------- | 15 |
| 338 | Wood screws of iron or steel---------- | 17 |
| 339 | Bathtubs, lavatories, sinks, and other sanitary wares of enameled iron or steel | 19 |
| 339 | Gold plated ware---------- | 20 |
| 339 | Silver-plated table, household, kitchen, and hospital utensils, and hollow or flatware, not specially provided for---------- | 21 |
| 339 | Base metal utensils, not plated with platinum, gold, or silver---------- | 22 |
| 339 | Hollow or flat ware, not specially provided for---------- | 25 |
| 339 | Utensils and hollow or flatware-enameled | 27 |
| 339 | Aluminum utensils and hollow or flatware---------- | 29 |
| 339 | Copper utensils and hollow or flatware-- | 31 |
| 339 | Brass utensils and hollow or flatware--- | 32 |
| 339 | Antimony utensils and hollow or flatware | 34 |
| 339 | Pewter utensils and hollow or flat ware (other pewter manufactures are dutiable under par. 397)---------- | 35 |
| 339 | Base metal utensils, n.e.s.---------- | 36 |
| 339 | Carbonated water siphons---------- | 38 |
| 339 | Household meat and food choppers--------- | 39 |
| 341 | Plates for printing---------- | 41 |
| 342 | Umbrella ribs, stretchers, and tubes---- | 43 |
| 343 | Machine needles, except knitting--------- | 44 |
| 343 | Needles, hand (crochet, knitting, and tape needles), bodkins, and needle cases or books---------- | 46 |
| 344 | Cylindrical steel rolls, ground and polished---------- | 48 |
| 345 | Harness and saddlery hardware---------- | 49 |
| 346 | Metal buckles---------- | 51 |
| 347 | Hooks and eyes, metallic---------- | 54 |
| 348 | Snap fasteners, clasps, and parts, not plated with precious metals, valued not more than $1.66-2/3 per hundred---- | 55 |
| 349 | Metal buttons---------- | 56 |
| 350 | Metal pins---------- | 58 |
| 351 | Pens, metallic, except gold---------- | 60 |
| 352 | Cutting tools with specified alloys----- | 62 |

Contents


| Tariff paragraph | Title of Digest | Page |
|---|---|---|
| 353 | Electrical apparatus (Summary Digest)------ | 63 |
| 353 | Engineering electrical equipment and motors and parts---------- | 66 |
| 353 | Radio and similar equipment and parts- | 68 |
| 353 | Telegraph apparatus, n.e.s., and parts | 70 |
| 353 | Telephone apparatus, n.e.s., and parts | 71 |
| 353 | X-ray, therapeutic and diagnostic apparatus and parts---------- | 73 |
| 353 | Primary cells (batteries), flashlights, and flashlight cases---------- | 75 |
| 353 | Electric ranges and parts---------- | 76 |
| 353 | Electrical wiring devices and parts--- | 77 |
| 353 | Electrical goods, n.e.s., and parts--- | 78 |
| 353 | Machines with electrical elements and parts---------- | 80 |
| 353 | Electrical calculating machines and parts---------- | 85 |
| 354-5) 357-8) | Cutlery (Summary Digest)---------- | 86 |
| 354 | Knives with folding blades---------- | 90 |
| 354 | Cuticle and corn knives, nail files, tweezers, manicure and pedicure nippers, and parts---------- | 95 |
| 355 | Fixed blade cutlery (includes hunting, curriers', farriers', hay, tanners', painters', shoe, beet-topping, and similar knives, and table kitchen, butchers', and similar cutlery, cleavers, forks, and steels; hay forks and 4-tined manure forks are not included herein)---------- | 97 |
| 357 | Pruning and sheep shears and blades--- | 105 |
| 357 | Scissors and shears (except pruning and sheep shears and surgical scissors and shears), and blades therefor----- | 108 |
| 357 | Clippers: Nail, barbers', and animal-- | 111 |
| 358 | Safety razors, handles, frames, and blades---------- | 113 |
| 358 | Razors (except safety razors and electric shavers) and parts---------- | 116 |
| 355 | Hay forks and four-tined manure forks------ | 118 |
| 356 | Machine knives and blades---------- | 120 |
| 359 | Dental and surgical needles and dental forceps---------- | 122 |
| 360 | Pyrometers and moisture testers and parts-- | 124 |
| 360 | Instruments for determining strength of materials---------- | 125 |
| 364 | Bells (except church bells and carillons)-- | 126 |
| 365 | Rifles, shotguns, and parts---------- | 128 |
| 365 | Combination shotguns and rifles---------- | 131 |
| 366 | Pistols, revolvers, and parts- ---------- | 133 |
| 368(a)(c) | Marine chronometers and parts---------- | 135 |
| 368(a)(c) | Ships' logs, depth sounders, and parts----- | 137 |
| 368(c)(3) | Assemblies and subassemblies for clocks and clockwork mechanisms ---------- | 139 |
| 368(e) | Clock cases---------- | 141 |
| 368(g) | Taximeters and parts---------- | 142 |
| 369(a)(b)(c) | Motor vehicles and parts, except inner tubes | 143 |
| 369(b)(c) | Motorcycles and parts---------- | 146 |
| 370 | Aircraft and parts (except tires and inner tubes)---------- | 148 |
| 370 | Motorboats (pleasure) and parts---------- | 152 |
| 371 | Bicycles and parts---------- | 154 |

## Introduction

This volume (Volume III) contains approximately 230 digests of statistical, technical, and trade data on metallic ores, metals, and metal manufactures, which have been listed (up to November 9, 1946) by the Trade Agreements Committee for consideration in the proposed trade agreement negotiations with those foreign countries which have been invited to participate in the so-called "nuclear" group. The digests cover all listed products provided for in Schedule 3 of the Tariff Act of 1930 and related items on the Free List of the tariff act which are subject to import-excise taxes. Volumes similar to this one have been or are being prepared by the Tariff Commission on commodities provided for under other schedules of the tariff act which have been listed for these negotiations. The products on the Free List of the act which are subject to import-excise or processing taxes are treated as dutiable commodities and are covered by digests which appear in the volumes for the tariff schedules to which such products are most nearly related. In addition, a special volume will be issued covering all commodities on the Free List which have been listed for the negotiations, and which are not subject to import-excise or processing taxes.

Volume III is in three parts. Part 1 includes digests on items, provided for in paragraphs 301 to 328, inclusive, of Schedule 3 of the Tariff Act of 1930, which are listed for consideration in the proposed negotiations; part 2 includes digests on listed items provided for in paragraphs 329 to 371, inclusive; and part 3 includes digests on listed items in paragraph 372 and all following paragraphs in Schedule 3 and digests on related items in the Free List subject to import-excise taxes.

Schedule 3 provides for a wide variety of metal products ranging from metallic ores through unmanufactured metals and mill products to completely fabricated articles ready for final consumption. The principal related products on the Free List which are subject to import-excise taxes are copper oreas, unmanufactured copper, lignite, coal, and coke.

United States production in 1939 of the commodities of the kinds covered by Schedule 3 and all related products on the Free List subject to import-excise taxes (including items not listed for the proposed negotiations) was as follows 1/: Iron and steel rolling mill and foundry products, 3,878 million dollars; nonferrous metals and ferro-alloys, 477 million dollars; other metal products (advanced manufactures), 9,294 million dollars. The output of these products during the war, of course, greatly exceeded the output in 1939. As most of the output of rolling mill and foundry products and as practically all of the non-ferrous metals and ferro-alloys are used in the production of advanced metal manufactures, a combined total of the three figures given here would contain extensive duplic tion. Moreover, there is considerable duplication within each of these figures.



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1/ The value of the domestic output of coal and related solid mineral fuels is not included in the production figures given here, as only negligible quantities of the imports of these products are subject to the import-excise tax. In 1939 domestic production of these fuels amounted to somewhat less than 1 1/4 billion dollars, exports amounted to about 67 million dollars, and total United States imports to 5 million dollars. (foreign value), of which $26,000 was taxable.

United States imports of all products provided for in Schedule 3 (those listed as well as those not listed for consideration in the proposed negotiations), and including related items on the Free List subject to import-excise taxes, amounted to 94 million dollars [1] (foreign value) in 1939. The total imports in 1939 were slightly smaller than in 1937, the peak year of the 1930's, but substantially larger than the average annual imports during the five pre-war years (1935-39). In the aggregate, these imports supplied about 0.7 percent of the value of domestic consumption (estimated, excluding duplication) before the war, though for many items the ratio was much higher or lower. Imports of low-priced iron and steel rolling mill and foundry products have come largely from Germany and Belgium, while high-priced steel products have come principally from Sweden. Imports of manganese ore, the most important nonferrous metal in the imports into the United States, comes largely from the U.S.S.R., India, the Gold Coast, and Cuba. The imports of advanced manufactures of metals come mostly from the highly industrialized countries of Europe.

The value of United States exports of all products of the kinds provided for in Schedule 3, including related items on the Free List subject to import-excise taxes, amounted to 1.3 billion dollars [2] in 1939. Exports of metals and manufactures go to practically every country of the world. Canada and the United Kingdom are the leading export markets; these two countries took about one-third of the 1939 exports. The principal export items are motor vehicles, electrical apparatus, machine tools, other industrial machinery, and iron and steel rolling mill products.

The ratio of the duties (and import-excise taxes) collected on all imports of products provided for in Schedule 3 (including related items on the Free List which are subject to import-excise taxes) to the foreign value of such imports was 30 percent in 1939.

Those items listed for consideration in the proposed negotiations, and covered by the digests contained herein, represented approximately 80 percent by value of the total imports in 1939 of all commodities provided for in Schedule 3 and all related Free List items subject to import-excise taxes. [3] The listed items represent about 75 percent of the value of imports in 1939 of iron and steel rolling mill and foundry products, practically all of the imports of nonferrous ores, metals, and ferro-alloys, and about 60 percent of the imports of all other metal products. Of the total value of imports in 1939 of the items listed for consideration in the proposed negotiations about two-thirds were accounted for by the following 5 commodities in the order of magnitude: nickel and manufactures, ferro-alloys, clocks and watches, machinery and electrical apparatus, aluminum and manufactures.

## Explanatory Notes

The digests presented herein have been kept as brief as possible and contain only the data most pertinent to an understanding of the international competitive situation with respect to the various products. It was obviously impractical to include all the facts pertaining to the many commodities listed for consideration. Supplementing the data given in the digests, and available for use in the negotiations, is the extensive information contained in the files of the Commission and in its numerous published reports, as well as the knowledge and experience of its staff.

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1/ This figure does not include imports of copper and other metals free of duty (or excise tax) for smelting, refining and export, or imports for consumption free of duty from Cuba and the Philippine Islands, but it does include all taxable imports for consumption of such metals.

2/ Does not include reexports of copper and other metals imported duty or tax free for smelting, refining, and export, but it does include exports of such metals contained in products on which drawback of the duty or tax was paid and exports of such metals produced in the United States.

3/ Items, which in 1939 accounted for 70 percent of the total value of imports under Schedule 3, were subject to reduced rates of duty provided in trade agreements in effect on April 1, 1945.

# CHAINS, OTHER THAN POWER TRANSMISSION

(See related digest on power-transmission chains, par. 329)

**Stat. import classes (1939):** 620.44-.49

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | CANADA | Germany 1/ | Japan |
| | Quantity (pounds) | | | | | | |
| 1937 | Not available | 7,439,239 | 741,378 | 164,732 | 327,189 | 117,408 | 63,806 |
| 1938 | | 3,603,369 | 165,347 | 64,271 | 3,509 | 46,607 | 11,921 |
| 1939 | | 4,802,706 | 151,916 | 44,142 | 32,883 | 27,278 | 6,417 |
| 1943 | | 2/ 39,643,827 | 3/ 1,561,870 | - | 1,561,670 | - | - |
| | Value (dollars) | | | | | | |
| 1937 | Not available | 695,740 | 65,267 | 12,777 | 17,203 | 21,193 | 6,068 |
| 1938 | | 510,150 | 21,598 | 6,456 | 537 | 9,109 | 1,289 |
| 1939 | | 597,189 | 17,123 | 4,530 | 2,846 | 5,047 | 761 |
| 1943 | | 2/ 5,188,636 | 3/ 174,603 | - | 174,578 | - | - |

1/ Includes Austria, beginning 1938.
2/ Includes 18,012,483 pounds, valued at $2,880,150, exported under land-lease.
3/ Free for Government use, 446,710 pounds, valued at $57,726; also 67,636 pounds, valued at $9,733, free as an act of international courtesy.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Cents per pound | | |
| Par. 329 | | | |
| Chains, other than power transmission: | | | |
| Anchor or stud link chains: | | | |
| 2 inches or more in diameter | 1-1/2 | 1-1/2 | UNITED KINGDOM |
| Less than 2 inches in diameter | 2 | 2 | do. |
| Other: | | | |
| Not less than 3/4 inch in diameter | 7/8 | 7/8 | do. |
| Less than 3/4, not less than 3/8 inch in diameter | 1-1/8 | 1/ 3/4 | UNITED KINGDOM, CANADA |
| Less than 3/8, not less than 5/16 inch in diameter | 2-1/8 | 1/ 1-1/2 | do. |
| Less than 5/16 inch in diameter | 4 | 4 | UNITED KINGDOM |

1/ Trade agreement with Canada, effective January 1939.

Note.- The phrase "in diameter" refers to the diameter of the metal composing the links of the chain. For ad valorem equivalents of the duties, see table at end of digest.

## Comment

The chains discussed in this digest range from large anchor chains to small key chains. Those with welded links include wagon, dredge, logging, anchor, and tire chains. Chains with links formed by twisting or bending, instead of welding, include swing, hammock, sash, dog, and key chains. Some chains for very heavy duty are cast from steel. They include mooring chains, log and stone conveyor chains, quarry chains, and some anchor chains. Excluded from the chains considered in this digest are watch chains and other types of chains worn by individuals, which are classified as jewelry in paragraph 1527.

CHAINS, OTHER THAN POWER TRANSMISSION-Continued

Official statistics for United States production of these chains are not available, but output is known to be large and may amount in value to as much as 15 million dollars a year. Imports are generally less than 1 percent of production and exports less than 5 percent. Tire chains generally constitute about 50 percent of domestic production and welded chains about 35 percent. The remainder consists of a large variety of sash and other weldless chains. There are probably 50 domestic producers, most of which are small or engaged principally in making other products. However, at least six large firms specialize in chains. The largest producer operates several plants in the United States and has affiliated companies in Canada and England but only a few of this firm's plants produce chains primarily.

The leading foreign producers are located in Germany and the United Kingdom. Other producing countries of some importance are France, Belgium, Sweden, Italy, Czechoslovakia, Canada, and Japan. Both Germany and the United Kingdom are important in international trade. Their exports are usually substantially greater than those from the United States. The principal foreign markets for the American products are Canada, the United Kingdom, and Latin American countries.

The principal foreign suppliers of the United States market are normally the United Kingdom and Germany, although in some years substantial quantities have also been imported from Sweden, Canada, and Japan. After 1936 Canada increased in importance as a supplier, particularly of chains 3/8 inch or more in diameter. This size also constituted the bulk of the imports from Japan. Imports from Sweden were principally of chain between 3/8 and 3/4 inch in diameter. Anchor chains normally constitute a very small part of imports.

Chains, other than power transmission: United States imports for consumption, by kinds, with principal sources, and ad valorem equivalents, 1939

| Kind | Ad valorem equivalent of the duty | 1939 | Principal sources |
|---|---|---|---|
| | Percent | Total value | |
| Anchor or stud link chain: | | | |
| 2 inches or more in diameter | 3 | $11 | Canada, $11 |
| Less than 2 inches in diameter | 1/ 26 | - | - |
| Other: | | | |
| Not less than 3/4 inch in diameter | 12 | 5,886 | UNITED KINGDOM, $2,185; Sweden, $2,056; Canada, $1,645. |
| Less than 3/4, not less than 3/8 inch in diameter | 9 | 2,731 | United Kingdom, $1,472; Canada, $821; Sweden, $413. |
| Less than 3/8, not less than 5/16 inch in diameter | 8 | 358 | Canada, $234; UNITED KINGDOM, $112 |
| Less than 5/16 inch in diameter | 20 | 8,137 | Germany, 2/ $5,047; France, $1,430; UNITED KINGDOM, $761; Japan, $761 |

1/ Based on 1937, as there were no imports in 1939.
2/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

# POWER-TRANSMISSION CHAINS

(See related digest on chains, other than power-transmission, par. 329)

Stat. import classes (1939): 620.41-.43

United States production, exports, and imports, 1937-39 and 1943

| Year | Production 1/ | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Czecho-slovakia | Canada | Germany 2/ |
| | Quantity (pounds) | | | | | | |
| 1937 | Not available | 5,222,416 | 314,580 | 90,819 | 19,899 | 4,355 | 191,734 |
| 1938 | | 3,196,452 | 92,321 | 51,617 | 23,470 | 12,074 | 4,430 |
| 1939 | | 3,957,535 | 61,928 | 32,122 | 26,122 | 477 | 325 |
| 1943 | | 2,250,063 | 3/ 131,710 | 11,596 | - | 120,114 | - |
| | Value (dollars) | | | | | | |
| 1937 | Not available | 1,186,252 | 61,984 | 41,901 | 2,746 | 1,037 | 14,425 |
| 1938 | | 802,431 | 30,890 | 23,459 | 3,836 | 1,565 | 1,655 |
| 1939 | | 1,001,860 | 25,644 | 19,366 | 4,351 | 738 | 141 |
| 1943 | | 634,702 | 3/ 37,671 | 8,053 | - | 29,618 | - |

1/ Although not officially reported, domestic production was probably around 10 million dollars per year.

2/ Includes Austria beginning 1938.

3/ Free for Government use, 117,162 pounds, valued at $27,100.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 329 | | | |
| Power transmission chains and parts: | | | |
| Not more than 2-inch pitch and more than 3 parts per pitch: | | | |
| Valued less than 40¢ per pound -- | 40 | 40 | UNITED KINGDOM |
| Valued 40¢ or more per pound ---- | 40 | 1/ 25 | do. |
| All other ---------- | 35 | 1/ 25 | do. |

1/ Trade agreement with the United Kingdom, effective January 1939.

## Comment

Power-transmission chains are of two general types: (1) Machined chains, and (2) semifinished chains, generally referred to as sprocket chains. The machined chains are high-grade precision products. Semifinished chains, usually of malleable cast iron, are generally made with less precision and are, therefore, lower priced. Machined chains are generally of 2-inch pitch or less (2 inches or less between the centers of adjacent links) and contain more than three parts per pitch. Sprocket chains generally have a pitch of more than 2 inches.

The United States is one of the leading world producers of power transmission chains. They are frequently made in connection with other products, particularly industrial machinery and motor vehicle parts.

Exports of American chains probably amount to less than 10 percent of production. They are shipped to all parts of the world, but Canada has been the outstanding market for many years, in part because American branch factories in Canada making machinery, motor vehicles, etc., use the American chains in the manufacture of their products.

POWER-TRANSMISSION CHAINS-Continued

The principal foreign producers are the United Kingdom and Germany. British chains are recognized throughout the world to be of high quality, whereas German chains are generally of lower grade.

Total imports are small in relation to domestic production and are much less than exports. In terms of value, imports have been principally from the United Kingdom; in terms of quantity, from Germany. British chains, principally of the machined type, were formerly imported in much larger quantities than in the later prewar years, having been displaced extensively by American chains when the quality of the latter was improved. In addition, the improved American chain generally sold at a lower price than the British.

Imports from Germany were principally bicycle chain, a type which was also imported from Japan in fairly large quantities for a few years in the middle thirties. Both countries made this type of chain principally for the American market, being a type not generally used for foreign-built bicycles. Consequently it competed directly with the domestic chain. Imports of bicycle chain under paragraph 329 decreased following a customs decision which classified such chain imported in lengths suitable for use on bicycles as parts of bicycles dutiable at 30 percent under paragraph 371. Imports of power transmission chain by pitch, from principal sources, are shown in the following table. Data are given for 1937 as well as 1939 as it was more representative of the prewar trade with respect to Germany.

Power transmission chain and parts: United States imports for consumption, by kinds, with principal sources, 1937 and 1939

| Kind | 1937 | | 1939 | |
|---|---|---|---|---|
| | Value | Principal sources | Value | Principal sources |
| Not more than 2-inch pitch and more than three parts per inch | $39,568 | UNITED KINGDOM, $21,361; Germany, $13,604; Czechoslovakia, $2,746; Japan, $1,271 | | |
| Valued less than 40¢ per pound | 1/ | | $5,032 | Czech., $4,351; UNITED KINGDOM, $678 |
| Valued 40¢ or more per pound | 1/ | | 14,660 | UNITED KINGDOM, $14,324; Canada, $303 |
| All other | 22,416 | UNITED KINGDOM, $20,540; Germany, $821; France, $604; Canada, $451 | 5,952 | UNITED KINGDOM, $4,364; Norway, $695; Canada, $432; France, $320; Germany, 2/ $141 |

1/ Not reported separately. 2/ Includes Austria beginning 1938.
Source: Official statistics of the U. S. Department of Commerce.

Par. No. 330
BELGIUM

## BOLTS, NUTS, WASHERS, AND BLANKS OF IRON OR STEEL

Stat. import classes (1939): 620.50-620.52

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from --- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | BELGIUM | Canada | United Kingdom | Germany 1/ |
| | Quantity (pounds) | | | | | | |
| 1937 | n.a. | Not available 3/ | 1,277,577 | 1,016,679 | 220,106 | 13,099 | 16,949 |
| 1938 | n.a. | | 458,197 | 323,569 | 36,563 | 13,858 | 70,713 |
| 1939 | 2/584,020,000 | | 253,319 | 145,133 | 46,801 | 13,279 | 45,673 |
| 1943 | n.a. | | 97,550 | - | 97,270 | 280 | - |
| | Value (dollars) | | | | | | |
| 1937 | n.a. | Not available 3/ | 47,728 | 36,295 | 5,015 | 1,506 | 3,916 |
| 1938 | n.a. | | 25,765 | 18,089 | 2,371 | 2,103 | 2,511 |
| 1939 | 2/43,535,000 | | 15,474 | 9,459 | 2,523 | 1,679 | 1,591 |
| 1943 | n.a. | | 13,150 | - | 13,110 | 40 | - |

1/ Includes Austria beginning 1938.
2/ Includes bolts, nuts, washers; value figures include a small amount of production not reported by quantity.
3/ Known to be many times larger than imports.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 330 | | | |
| Nuts, nut blanks, and washers, of wrought iron or steel. | 6/10¢ lb. | 6/10¢ lb. | BELGIUM |
| Bolts, with or without threads or nuts, and bolt blanks, of iron or steel. | 1¢ lb. | 1¢ lb. | do. |
| Spiral nut locks, and lock washers, of iron or steel. | 35% ad val. | 35% ad val. | do. |

Note.- The ad valorem equivalent of the specific rates on imports in 1939 were as follows: 6/10¢ per pound, equivalent to 6 percent ad valorem; 1¢ per pound, equivalent to 19 percent ad valorem. In 1937, when imports were much larger and included more low-priced bolts, the ad valorem equivalents of the specific rates on imports were: 6/10¢ per pound, equivalent to 9 percent ad valorem; 1¢ per pound, equivalent to 28 percent ad valorem.

### Comment

Iron and steel bolts, nuts, and washers--the principal products in paragraph 330 -- are usually of standard design, although lock nuts and lock washers are made to special designs. The spiral nut lock is a washer made of spring steel in the form of an open spiral, roughened or machined so as to engage the nut and prevent it from turning on the thread.

BOLTS, NUTS, WASHERS, AND BLANKS OF IRON OR STEEL - Continued

Production in the United States is carried on in many establishments, including steel mills, metal-fabricating shops which manufacture for their own use, and a large number of concerns which specialize in fastening devices for sale in the open market. According to the U. S. Bureau of the Census, in 1939 there were 155 establishments primarily engaged in the manufacture of bolts, nuts, rivets, lock washers, and similar products. Ohio is the leading producing State, with 34 establishments in 1939, followed by Illinois, Pennsylvania, Michigan, and Massachusetts; these 5 States together in 1939 had 106 establishments and about 14 other States accounted for the balance. The United States is the world's leading producer, and both in quality of products and in the use of the most advanced methods of mass production it surpasses all other producing countries.

Imports before the war were much smaller than exports and constituted only a fraction of 1 percent of domestic consumption. They consisted mainly of bolt blank of ordinary sizes and types, usually of a lower grade than those generally made in the United States, and they were sold through the low-priced hardware trade, primaril on the Atlantic Coast.

Bolts and bolt blanks, nuts, etc.: United States imports for consumption, by kind, with principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Bolts and bolt blanks | $11,325 | BELGIUM, $7,332; Canada, $1,826; Germany 1/, $1,493; United Kingdom, $460; Denmark, $136; France $53; Switzerland, $25. |
| Nuts, nut blanks, and washers | 3,540 | BELGIUM, $1,642; United Kingdom, $1,213; Canada, $677; Switzerland, $5; China, $3. |
| Nut locks, spiral, and lock washers. | 609 | BELGIUM, $485; Germany 1/, $98; Canada, $20; United Kingdom, $6. |

1/ Includes Austria.
Source: Official statistics of the U. S. Department of Commerce.

# NAILS, TACKS, BRADS, SPIKES, AND STAPLES (INCLUDES WIRE NAILS, CUT NAILS AND SPIKES, HORSESHOE NAILS, UPHOLSTERERS' NAILS AND THUMBTACKS, CHAIR GLIDES, ETC.)

Stat. import classes (1939): 6112.0-6112.9

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Germany 1/ | BELGIUM | Netherlands | Japan |
| | Quantity (1,000 pounds) | | | | | | |
| 1937 | 2/ 1,469,565 | 55,917 | 33,671 | 21,554 | 9,640 | 79 | 203 |
| 1938 | n.a. | 63,979 | 17,021 | 10,630 | 6,094 | 65 | 51 |
| 1939 | 2/ 1,806,308 | 80,120 | 16,324 | 7,730 | 8,137 | 101 | 23 |
| 1943 | n.a. | 3/ 126,858 | 4/ 31 | - | - | - | - |
| | Value (1,000 dollars) | | | | | | |
| 1937 | 52,612 | 2,192 | 1,087 | 717 | 174 | 26 | 44 |
| 1938 | n.a. | 2,212 | 650 | 469 | 135 | 17 | 18 |
| 1939 | 62,125 | 2,769 | 558 | 346 | 164 | 14 | 10 |
| 1943 | n.a. | 3/ 5,983 | 4/ 2 | - | - | - | - |

1/ Includes Austria beginning 1938. 2/ Partly estimated.
3/ Includes 88,590 thousand pounds, valued at 3,655 thousand dollars, exported under lend-lease.
4/ Includes 30 thousand pounds, valued at 2 thousand dollars, imported from Canada.
Source: Official statistics of the U. S. Department of Commerce, except at noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 331: | | | |
| Nails, tacks, brads, spikes, and staples, of iron or steel: | | | |
| Cut nails and spikes, over 2 in. long | 4/10¢ lb. | 4/10¢ lb. | BELGIUM |
| Cut nails, hobnails, not over 2 in. long | | 15% ad val. | do. |
| Horseshoe nails and nails, n.s.p.f. | 1½¢ lb. | 1½¢ lb. | do. |
| Tacks and brads, cut | 15% ad val. | 15% ad val. | do. |
| Upholsterers' nails and thumb tacks, of two or more pieces of iron or steel | 3¢ lb. | 4½¢ lb. 1/ | do. |
| Chair glides of two or more pieces of iron or steel | 3¢ lb. | 4½¢ lb. 1/ | do. |
| Staples in strip form for paper fasteners or stapling machines | 2¢ lb. | 2¢ lb. | do. |
| Wire nails, spikes, tacks, brads, and staples: | | | |
| Not less than 1 inch in length nor smaller than 65/1000 in. in diameter | 4/10¢ lb. | 4/10¢ lb. | do. |
| Less than 1 inch in length and smaller than 65/1000 in. in diameter | 3/4¢ lb. | 3/4¢ lb. | do. |
| Thumb tacks, n.s.p.f. | 6/10¢ lb. | 9/10¢ lb. 1/ | do. |
| Spikes, tacks, brads, and staples, n.s.p.f. | 6/10¢ lb. | 6/10¢ lb. | do. |

1/ Presidential proclamation under sec. 336 of the Tariff Act of 1930, effective January 1933.
Note.- For ad valorem equivalents of the duties, see table at end of digest.

NAILS, TACKS, BRADS, SPIKES, AND STAPLES (INCLUDES WIRE NAILS, CUT NAILS AND SPIKES, HORSESHOE NAILS, UPHOLSTERERS' NAILS AND THUMBTACKS, CHAIR GLIDES, ETC.)-Con.

Comment

Nails of iron or steel are included in this paragraph. Those of other metal are dutiable under paragraph 397. Wire nails, as the name implies, are made of wire, and constitute the largest item of the group covered by paragraph 331, both in domestic production and in prewar imports. Cut nails are square-sided nails, cut from a sheet of metal. They have greater holding qualities than wire nails and are, therefore, preferred to wire nails for certain kinds of work, such as the laying of hardwood floors.

There are two types of tacks--cut and wire. Cut tacks are used instead of wire tacks for upholstering, for laying carpets, and other purposes where greater holding qualities are desired. Spikes usually exceed 4½ inches in length, whereas nails are usually less than 4½ inches. Hobnails have short shanks and large, thick heads, and are used chiefly for studding the soles of heavy shoes. Horseshoe nails are made of wrought iron or ingot iron.

Upholsterers' nails are finishing nails and are known in the trade as chair nails. They are approximately one-half inch in length and have heads varying in size, shape, and finish, and are enameled or plated with brass, nickel, or other metal. (Upholsterers' nails of solid brass are dutiable under par. 397 as manufactures of metal not specially provided for.) Thumbtacks are used extensively in stores, in homes, and by draftsmen. They are either polished, plated, enameled, or covered with celluloid. A chair glide is a rounded steel disk with a center prong or with prongs bent down from the edge of the disk. They are inserted in the bottom of furniture legs to facilitate the sliding of furniture over floors. (The one-piece chair glide with prongs bent down from the side of the disk is dutiable under par. 397.)

Brads are small, slender nails, some of which have a projection on one or more sides instead of a regular head. Wire brads are similar to finishing nails and are used largely in cabinet work. One of the principal uses of cut brads is in the laying of linoleum.

Staples are made of wire. Those for paper-fastening or stapling machines are made from tinned or brighly finished wire and are lightly attached to each other with solder to form a strip for use in stapling machines.

The United States is the world's largest producer of nails, tacks, and most other articles included in paragraph 331, considered as a group. Those made of wire constitute over 70 percent of total production, based on value. In 1939 cut tacks constituted 6.6 percent of the total; horseshoe nails, cut nails, and spikes amounted to 4 percent; railroad spikes to over 16 percent; and thumbtacks and upholsterers' nails to 2.1 percent. The domestic industry, considered as a whole, is on an export basis, and except for upholsterers' nails and thumbtacks it supplies the great bulk of United States consumption. The separate domestic industries producing the different articles are fairly well defined, but there is some overlapping not only in the production of these articles but of other metal products. Wire nails are produced principally in the wire mills of large, integrated steel plants, one of which probably accounts for about two-fifths of the total production.

The leading foreign producers are the United Kingdom and Germany. Substantial quantities are also made in Belgium, the Netherlands, Canada, Japan, and other important industrial countries.

United States exports of items included in paragraph 331 consist principally of wire nails, which amounted to over 60 percent of the total value of exports in 1939. In the same year horseshoe nails amounted to over 7 percent of the total, railroad spikes to over 9 percent, and tacks to about 3 percent. Exports of all other items amounted to about 20 percent. The principal markets for several years before the war were the Philippine Islands, the Netherlands Indies, British Malaya, Cuba and other Latin American countries.

NAILS, TACKS, BRADS, SPIKES, AND STAPLES (INCLUDES WIRE NAILS, CUT NAILS AND SPIKES, HORSESHOE NAILS, UPHOLSTERERS' NAILS AND THUMBTACKS, CHAIR GLIDES, ETC.)-Con.

Before the war imports for the paragraph as a whole came principally from Germany, Belgium, the Netherlands, Japan, and Austria, but for some of the individual import classifications other countries were the leading suppliers. Besides differences in foreign suppliers, there were differences also in the competitive conditions for the various classes. Imports consisted principally of (1) wire nails, spikes, tacks, brads, and staples not less than 1 inch in length nor smaller than 65/1000 inch in diameter, and (2) upholsterers' nails and thumbtacks of two or more pieces of iron or steel.

Although the articles made of wire constituted, before the war, over half of the imports into the United States under this paragraph (in value) they were equivalent to only about 1 percent of United States production. Germany and Belgium were the principal suppliers, imports from Germany normally exceeding those from Belgium. Sales of the imported wire items were restricted largely to areas contiguous to ports of entry. The foreign articles were low-priced, but the added cost of transporting them considerable distances from the port of entry reduced this advantage.

Unlike wire nails and related wire products, imports of upholsterers' nails and thumbtacks before the war supplied a large portion of United States consumption. In 1931, of the total quantity of thumbtacks used in the domestic market, over half were imported; of upholsterers' nails, 47 percent. In the 3-year period 1929-31 domestic production of upholsterers' nails and thumbtacks declined while imports increased, even though the duty was increased in the act of 1930. In January 1933 the rates of duty on these articles were again increased by Presidential proclamation. Chair glides of two or more pieces were also included under this proclamation. Despite the higher rate of duty, imports increased substantially through 1937, but declined thereafter. Before the war Germany was the principal supplier of upholsterers' nails, thumbtacks, and chair glides. Japan ranked second. Other fairly important suppliers at times were the Netherlands and Austria, Belgium being relatively unimportant. Exports of upholsterers' nails and thumbtacks from the United States are not reported separately in official statistics, but are known to be small.

Imports of cut nails, cut spikes, and hobnails supply only a negligible part of United States consumption and constitute only a minor part of total imports of items included in this paragraph. The United Kingdom was the most consistent supplier in the 1930's, but imports from that country were exceeded at times by those from Germany, Switzerland, Canada, and the Netherlands. There have been no imports recorded from Belgium since 1930, although it was a fairly important supplier before that year. United States exports are not reported separately, but probably exceed imports. The principal markets are in Latin America.

Prewar imports of horseshoe nails amounted to less than one-tenth of 1 percent of domestic production. They came principally from Sweden, Canada, and Germany. A few were imported from Belgium in 1937, but ordinarily Belgium was not a factor in imports. Domestic exports were much larger than imports and constituted a substantial part of domestic output. The principal foreign markets are Colombia and Japan, followed by Turkey and other Latin American countries.

Before the war cut tacks and brads came principally from Czechoslovakia. After 1936 imports of staples for paper fasteners or stapling machines were irregular, and although no single supplier dominated the trade, substantial amounts came from the United Kingdom, Canada, Germany, and the Netherlands at irregular intervals; before 1936 Germany was the principal supplier. Germany was also the chief supplier before the war of spikes, tacks, brads, and staples not specially provided for, which include such articles made of metal other than iron or steel. Irregular shipments also came from Japan, Canada, and Belgium.

## NAILS, TACKS, BRADS, SPIKES, AND STAPLES (INCLUDES WIRE NAILS, CUT NAILS AND SPIKES, HORSESHOE NAILS, UPHOLSTERERS' NAILS AND THUMBTACKS, CHAIR GLIDES, ETC.)-Con.

In the following table imports by types and principal sources are shown for 1939 with the ad valorem equivalents of the rates for the various classifications having specific rates of duty.

Nails, tacks, brads, and related articles: United States imports for consumption, by kinds, with principal sources and equivalent ad valorem rates for 1939

| Kind | Pounds | Value | Principal sources | Ad valorem equivalent of the duties based on 1939 imports |
|---|---|---|---|---|
| | | | | Percent |
| Cut nails and spikes over 2 inches long | 12,030 | $412 | Netherlands, $371 | 11.7 |
| Cut nails, hobnails, not over 2 inches long | 6,152 | 965 | Germany, 1/ $416; Switzerland, $249; Canada, $211 | |
| Horseshoe nails and nails, n.s.p.f. | 11,409 | 1,135 | Sweden, $705; Germany, 1/ $400 | 15.1 |
| Tacks and brads, cut | 75 | 146 | United Kingdom, $146 | |
| Upholsterers' nails and thumbtacks of two or more pieces of iron or steel | 819,773 | 212,904 | Germany, 1/ $166,266; Netherlands, $11,610; Japan, $10,146; BELGIUM, $10,057 | 17.3 |
| Chair glides of two or more pieces of iron or steel | 23,320 | 3,545 | Germany, 1/ $3,545 | 29.6 |
| Staples for paper fasteners or stapling machines | 648 | 445 | Netherlands, $445 | 2.9 |
| Wire nails, spikes, tacks, brads, and staples: | | | | |
| Not less than 1 inch in length nor smaller than 65/1000 inch in diameter | 15,293,397 | 315,116 | Germany, 1/ $156,039; BELGIUM, $152,385 | 19.4 |
| Less than 1 inch in length and smaller than 65/1000 inch in diameter | 62,023 | 4,167 | Germany, 1/ $2,962; BELGIUM, $1,205 | 11.2 |
| Thumbtacks, n.s.p.f. | 44,486 | 16,702 | Germany, 1/ $15,399; BELGIUM, $220 | 2.4 |
| Spikes, tacks, brads, and staples, n.s.p.f. | 50,879 | 2,361 | Germany, 1/ $1,424; BELGIUM, $597 | 12.9 |
| Total | 16,324,192 | 557,898 | | |

1/ Includes Austria beginning 1938.

Source: Official statistics of the U. S. Department of Commerce.

Stat. import classes (1939): 620.53-.54

United States production, exports, and imports, 1937-39 and 1943

| Year | Production 1/ | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Canada | Germany 2/ | BELGIUM | France |
| | Quantity (short tons) | | | | | | |
| 1937 - | n.a. | Not available 4/ | 21 | 3 | 4 | 13 | 1 |
| 1938 - | n.a. | | 12 | 1 | 2 | 8 | 3/ |
| 1939 - | 131,253 | | 8 | 2 | 1 | 5 | 3/ |
| 1943 - | n.a. | | 6 | 6 | - | - | - |
| | Value (dollars) | | | | | | |
| 1937 - | n.a. | Not available 4/ | 6,746 | 267 | 2,844 | 805 | 1,855 |
| 1938 - | n.a. | | 2,585 | 54 | 1,383 | 652 | 370 |
| 1939 - | 13,608,632 | | 1,943 | 866 | 427 | 331 | 262 |
| 1943 - | n.a. | | 2,401 | 2,401 | - | - | - |

1/ Includes only rivets, hot-formed and cold-headed, made from rolling-mill products. Value of quantities not reported is included. U. S. Census of Manufactures, 1939.

2/ Includes Austria beginning 1938. 3/ Less than 1/2 short ton.

4/ Believed to be small but somewhat larger than imports.

Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 332 | | | |
| Rivets, studs, and steel points, lathed, machined, or brightened, and rivets or studs for nonskidding automobile tires | 30% ad val. | 30% ad val. | BELGIUM |
| Rivets of iron and steel, n.s.p.f. | 1¢ per lb. | 1¢ per lb. | BELGIUM |

Note.- The 1-cent-per-pound duty was equivalent to 14 percent ad valorem on all imports in 1939.

## Comment

Rivets are of two general types: solid and tubular or bifurcated. Solid rivets have a wide variety of uses in the construction of boilers, machinery, ships, and structures. Bifurcated or tubular rivets are commonly made of copper or copper-plated iron and are used in such materials as leather and cloth. A stud is a kind of nail with a large head, used chiefly for ornament, or a short article of malleable iron which in size and appearance closely resembles a link cuff button. The latter kind of stud is used to join together the ends of machinery belts. Steel points are small pieces of steel of different sizes, in various patterns such as rosettes, stars, arrows, etc., each having an iron shank. Their chief use is in the manufacture of decorative buttons, buckles, and cheap jewelry.

# GRIT, SHOT, AND SAND OF IRON OR STEEL



Stat. import class (1939): 547.51

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | |
|---|---|---|---|---|---|
| | | | All countries | Germany 1/ | UNITED KINGDOM |
| | Quantity (1,000 pounds) | | | | |
| 1937 --- | 56,062 | n.a. | 1,342 | 13 | 1,327 |
| 1938 --- | 51,542 | n.a. | 324 | 25 | 299 |
| 1939 --- | 84,030 | n.a. | 345 | 116 | 229 |
| 1943 --- | 249,908 | 2/ 9,328 | - | - | - |
| | Value (1,000 dollars) | | | | |
| 1937 --- | 1,400 | n.a. | 29 | 6 | 23 |
| 1938 --- | 1,235 | n.a. | 23 | 16 | 6 |
| 1939 --- | 1,744 | n.a. | 82 | 77 | 5 |
| 1943 --- | 7,083 | 2/ 307 | - | - | - |

1/ Includes Austria beginning 1938.
2/ Classified as steel abrasives; includes 112 thousand pounds valued at 5 thousand dollars exported under lend-lease.
Source: Production from official statistics of the U. S. Bureau of Mines; exports and imports from official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Cents per pound | | |
| Par. 335 | | | |
| Grit, shot, and sand of iron or steel | 3/4 | 1/ 5/8 | UNITED KINGDOM |

1/ Trade agreement with the United Kingdom, effective January 1939
Note.- The duty on total imports in 1939, including those from Germany dutiable at the preagreement rate, was equivalent to 3 percent ad valorem.

## Comment

Grit, shot, and sand of iron or steel are used principally for abrasive purposes. Steel shot is high-quality chilled cast iron. The molten metal is separated into small spherical globules by directing high-pressure steam or heated compressed air against a stream of molten metal. The globules are then blown into water to cool. The shot is graded into 15 sizes ranging from 4- to 90-mesh. Coarse material left on the 4-mesh screen is granulated by specially designed crushing equipment and is known as angular steel grit. This latter material is then graded into 15 sizes ranging from 7- to 100-mesh.

Another form of grit known as crushed steel is made from high-carbon and crucible sheet steel, which is crushed to size. Sizes from 70-mesh to 200-mesh are screened on silk bolting cloth. In powder form it is used in steel cement, in various chemical compounds, and in fireworks sparklers.

In 1943 there were 12 producers in the United States, located principally in Ohio, Pennsylvania, Michigan, New Hampshire, and Massachusetts. Less than 10 percent of the domestic output is exported, principally to Canada.

Normally, the principal foreign producers and exporters are the United Kingdom and Germany. The United Kingdom usually supplies the bulk of the United States imports, but was exceeded by Germany in 1938 and 1939.

# CORSET CLASPS, AND CORSET AND DRESS STEELS

Stat. import class (1939): 610.03

United States Production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from — | | |
|---|---|---|---|---|---|
| | | | All countries | France | UNITED KINGDOM |
| | Quantity (pounds) | | | | |
| 1937 | Not available | Not available | 1,799 | 647 | 1,152 |
| 1938 | | | 195 | 195 | - |
| 1939 | | | 373 | 373 | - |
| 1943 | | | - | - | - |
| | Value (dollars) | | | | |
| 1937 | Not available | Not available | 1,127 | 455 | 672 |
| 1938 | | | 184 | 184 | - |
| 1939 | | | 359 | 359 | - |
| 1943 | | | - | - | - |

Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 336 | | | |
| Corset clasps, and corset and dress steels | 35 | 35 | UNITED KINGDOM |

## Comment

Corset clasps consist of flat metal eyelets and small metal studs which are riveted to strips of flat steel wire, the eyelets on one strip and the studs on another so that the eyelets can be hooked over the studs to fasten the corset. Corset and dress steels are also made of flat wire, usually of high-carbon spring steel. The wire is covered with paper, cotton gauze, or other material, and then cut to length and the ends capped before incorporation in the garments. These processes are simple and are performed on automatic machines.

These articles are sometimes produced by manufacturers of corsets, as well as by accessory manufacturers. Production was substantial until the early 20's when changes in the style of women's clothing caused production and imports to decline sharply. Official statistical data are not available for domestic production, but it is known that present output, although small, is much larger than imports. France has supplied practically all of the small amounts imported. A few were supplied by the United Kingdom in 1936 and 1937.

The leading foreign producers of clasps and steels were France and Germany.

CARD CLOTHING

Par. No. 337
UNITED KINGDOM
BELGIUM

Stat. import classes (1939): 6097.0, 6097.1, and 6097.2

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | BELGIUM | Germany 1/ |
| | Quantity (1,000 square feet) | | | | | |
| 1937 | 1,193 | Not available | 342 | 295 | 18 | 14 |
| 1938 | n.a. | | 168 | 149 | 13 | 5 |
| 1939 | 1,009 | | 250 | 229 | 17 | 3 |
| 1943 | n.a. | | 377 | 377 | - | - |
| | Value (1,000 dollars) | | | | | |
| 1937 | 3,267 | 51 | 527 | 453 | 31 | 25 |
| 1938 | n.a. | 84 | 287 | 250 | 25 | 10 |
| 1939 | 2,537 | 43 | 372 | 331 | 30 | 7 |
| 1943 | n.a. | n.a. | 642 | 642 | - | - |

1/ Includes Austria beginning 1938.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 337 | Percent ad valorem | | |
| Card clothing not actually and permanently fitted to and attached to carding machines or to parts thereof at the time of importation: | | | |
| When manufactured with round iron or untempered steel wire | 20 | 1/ 15 | UNITED KINGDOM |
| When manufactured with tempered round steel wire | 45 | 1/ 35 | do. |
| When manufactured with plated wire, or with felt face, wool face, or rubber-face cloth containing wool | 45 | 1/ 35 | UNITED KINGDOM, BELGIUM |

1/ Trade agreement with United Kingdom, effective January 1939.

## Comment

Card clothing is a heavy fabric of several cemented layers of cotton, wool, rubber, or other materials, set closely over its surface with short wire teeth. Cylinders, rolls, and other moving parts of carding machines are covered with card clothing, which cleans and straightens the cotton, wool, or other textile fibers as they pass over the fine teeth. The construction of the clothing is varied to suit different fibers and end products. Distinct types are used for cotton, jute, and wool, and there are many variations within the types. Production is principally to replace worn-out clothing.

Card clothing is made in the United States by about 10 manufacturers, some of whom make other textile accessories. About half of them make clothing for cotton, and all of them make clothing for wool. Automatic machines are used, but long training is necessary before operators can prevent slight but damaging defects in the product. Clothing for jute is in limited use in the United States and domestic firms do not generally make it. This is the kind that was dutiable at 20 percent under the act of 1930.

CARD CLOTHING-Continued

Foreign producing countries are Great Britain, Germany, Belgium, France, Switzerland, the Soviet Union, Italy, and Japan. Great Britain is much the largest. Most of the United States imports come from the three members of an English "combine" or cartel. The cartel supervises operations and fixes home and export prices. In 1939 the value of British production was about twice that in the United States.

Roughly half of the card clothing made in this country is for carding wool, but, as it is higher priced, the value may be 50 percent greater than the total of all other kinds. It is demanded in great variety for many conditions and to meet individual preferences. Since importers have not found it profitable to keep in stock in this country the many varieties needed for prompt delivery, imports of this type have been small.

Clothing for cotton carding is much more standardized, and importers keep large stocks near the cotton mills. Thus foreign competition is concentrated in the cotton textile industry, and imports furnish a large fraction of the consumption in this field. There seems to be practically no difference in quality or price between the domestic and the imported material. Imports, with short-term variations, have remained at about the same level in quantity for many years, but as prices have increased their value has nearly doubled in 30 years. Consumption depends on cotton mill activity, not on price of card clothing.

Card clothing: United States imports for consumption, by kind with principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Round iron or untempered round steel wire | $10,316 | UNITED KINGDOM, $7,151; Germany, 1/ $3,165 |
| Tempered round steel wire | 342,189 | UNITED KINGDOM, $319,404; Belgium, $15,198; Germany, 1/ $3,769 |
| Other | 19,003 | BELGIUM, $14,327, UNITED KINGDOM, $4,349 |

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

In 1939, after the reductions in the duties by the trade agreement with the United Kingdom effective January 1 of that year, imports were considerably larger than in 1938, although smaller than in 1937. The improvement in the United States cotton textile industry in 1939 as compared with 1938 may have been a more important factor than the reduction in duties. However, the disturbed political and economic conditions in the United Kingdom may have prevented a greater increase in the imports.

# WOOD SCREWS OF IRON OR STEEL

Stat. import class (1939): 620.82

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | BELGIUM | Japan | Germany 1/ | Sweden |
| | Quantity (gross) | | | | | | |
| 1937 | 2/ 46,200,000 | 508,029 | 585,182 | 186,150 | 357,486 | 20,532 | 1,920 |
| 1938 | n.a. | 236,906 | 220,964 | 117,949 | 81,286 | 14,830 | 988 |
| 1939 | 2/ 39,800,000 | 294,413 | 144,502 | 97,715 | 35,950 | 9,065 | - |
| 1943 | n.a. | 3/ 3,892,011 | 4/ 1,512 | - | - | - | - |
| | Value (dollars) | | | | | | |
| 1937 | 7,632,130 | 77,150 | 39,132 | 16,663 | 18,060 | 2,070 | 248 |
| 1938 | n.a. | 44,794 | 16,220 | 9,061 | 4,778 | 1,564 | 152 |
| 1939 | 6,026,299 | 53,181 | 11,878 | 9,562 | 1,045 | 806 | - |
| 1943 | n.a. | 3/ 837,033 | 4/ 236 | - | - | - | - |

1/ Includes Austria beginning 1938. 2/ Partly estimated.
3/ Includes 2,601,481 gross, valued at $12,124, exported under lend-lease.
4/ From Canada.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 338 | | | |
| Wood screws of iron or steel ---------- | 25 | 25 | BELGIUM |

## Comment

This digest is limited to wood screws of iron or steel. Those of nonferrous metals, the production of which amounted to less than one-fifth that of iron and steel screws in 1939, are dutiable under paragraph 397 and, therefore, omitted. The domestic wood screw industry is located principally in Connecticut. Some domestic firms are engaged primarily in the production of these items; others produce wood screws in conjunction with numerous other small metal articles. The manufacture of screws is a highly automatic machine process well adapted to the economy of the United States.

Exports from the United States before 1930 constituted over 10 percent of domestic output. During those years Japan and the United Kingdom were by far the principal markets for the American product. After 1930 the relative importance of exports declined sharply, representing in 1939 less than one percent of production. By that time Japan had ceased to be an important market, and shipments to the British market had declined substantially. Wood screws are now distributed among a large number of foreign markets, particularly in Latin America, Canada, and in the Asiatic area other than Japan.

WOOD SCREWS OF IRON OR STEEL--Continued

Leading foreign producers include Canada, England, France, Belgium, Germany, Italy, and, since the early thirties, Japan. Before the war Germany, Sweden, and the United Kingdom were probably the leading foreign exporters, with exports from Germany greatly exceeding those from any other country. With the establishment of the industry in Japan, the Japanese manufacturers were not only able to supply a large part of their home market, but were able to enter expert markets.

United States imports of wood screws amount to less than one percent of the total value of those produced in this country, but they are all of United States standard sizes and shapes and, consequently, directly competitive. For many years Sweden was the principal supplier, accounting for over 95 percent of the imports (value basis) in 1929, the peak year. Belgium and Japan were the leading sources in the middle thirties, after which Japan declined in importance. In 1937 the value of imports was approximately the same as in 1929, but the quantity was larger by 70 percent. In that year Japan accounted for over 60 percent of the total quantity imported and 46 percent of the value. Belgium accounted for 32 percent of the quantity and 42 percent of the value. Imports since the beginning of the war, negligible in amount, have come principally from Canada.

## BATHTUBS, LAVATORIES, SINKS, AND OTHER SANITARY WARES OF ENAMELED IRON OR STEEL

Stat. import class (1939): 6141.5

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | Denmark | CANADA | United Kingdom |
| | Quantity (pounds) | | | | | |
| 1937 | Not | Not | 300 | - | - | 300 |
| 1938 | avail- | avail- | 2/ 120 | - | - | - |
| 1939 | able | able 1/ | 630 | 310 | 320 | - |
| 1943 | | | 3/1,066 | - | - | - |
| | Value (dollars) | | | | | |
| 1937 | 34,677,000 | 941,000 | 26 | - | - | 36 |
| 1938 | n.a. | 823,000 | 2/ 21 | - | - | - |
| 1939 | 43,357,000 | 1,082,000 | 98 | 77 | 21 | - |
| 1943 | n.a. | 268,000 | 3/ 262 | - | - | - |

1/ Exports are not reported in pounds.
2/ Imported from Germany, including Austria.
3/ Almost entirely from Mexico.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 339 | | | |
| Hollow or flat ware, not specially provided for, composed of iron or steel and enameled or glazed with vitreous glasses: | | | |
| Sanitary wares | 5¢ lb. + 30% ad val. | 5¢ lb. + 15% ad val. 1/ | CANADA |

1/ Trade agreement with Sweden, effective August 1935; bound in trade agreement with Czechoslovakia, from April 1938 to April 1939.
Note.- Because of the insignificant imports the ad valorem equivalent of the duty has not been computed.

### Comment

Sanitary enameled ware is produced in the United States by about 20 concerns. The principal producing States are Pennsylvania, California, Ohio, Illinois, Indiana, Wisconsin, Kentucky, Maryland, New Jersey, Tennessee, and West Virginia. Imports are negligible. Exports are substantial and go principally to Mexico, Cuba, Canada, the Philippine Islands, and South American countries.

GOLD-PLATED WARE

/Includes table (except cutlery), household, and similar utensils, and hollow or flatware; other gold-plated articles are dutiable in par. 397/

Stat. import class (1939): 690.14

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | CHINA | Japan | United Kingdom |
| | Value (dollars) | | | | | |
| 1937 ----- | 1,000,000 annually 1/ | Not available 2/ | 25,179 | 14,875 | 1,004 | 6,175 |
| 1938 ----- | | | 14,641 | 8,311 | 2,291 | 2,511 |
| 1939 ----- | | | 6,522 | 5,419 | 603 | 244 |
| 1943 ----- | | | 760 | - | - | 591 |

1/ Estimated.

2/ Probably two or three times as large as imports; included in export statistics with solid gold articles.

Source: Imports from official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 339 | | | |
| Table, household, kitchen, and hospital utensils, and hollow or flat ware, not specially provided for, plated with gold ---------- | 65 | 65 | CHINA |

Comment

The high price of gold ($35 per ounce) narrowly limits the use of solid gold utensils, but gold can be used effectively and at reasonable cost as a plating material for a good many relatively inexpensive articles. Consumption of gold-plated ware in the United States, however, is confined largely to specialties such as baby cups, cocktail sets, and the like.

Imports have come chiefly from China, although a number of countries, notably Japan, the United Kingdom, and France, have participated in the trade. Imports have consisted of trays, cup sets, vases, and boxes of various kinds. Imports from China include handicraft articles which reflect the traditional and individual skill of the Chinese.

SILVER-PLATED TABLE, HOUSEHOLD, KITCHEN, AND HOSPITAL UTENSILS, AND HOLLOW OR FLATWARE, NOT SPECIALLY PROVIDED FOR

(See Summary Digest on Silverware, Par. 397, Vol. III, Part 3)

Par. No. 339
CHINA
UNITED KINGDOM
CZECHOSLOVAKIA
BELGIUM

## BASE METAL UTENSILS, NOT PLATED WITH PLATINUM, GOLD, OR SILVER

Stat. import classes (1939): 6141.0, 620.97, 6304.0, 643.09, 6453.8, 679.66-.68, 679.70, 709.51-4; 709.59; 780.48

United States production, exports, and imports, 1937-39 and 1943

| Country | 1937 | 1938 | 1939 | 1943 |
|---|---|---|---|---|
| | Value (dollars) | | | |
| Production | 1/ 101,000,000 | n.a. | 1/ 95,000,000 | n.a. |
| Domestic exports | 2/ 694,584 | 2/ 641,988 | 2/ 710,980 | 2/ 1,844,519 |
| Imports for consumption from: | | | | |
| Total, all countries | 914,345 | 601,024 | 560,102 | 3/ 46,721 |
| CHINA | 152,203 | 105,788 | 150,354 | 294 |
| Japan | 282,339 | 112,173 | 79,342 | 718 |
| UNITED KINGDOM | 84,083 | 55,439 | 62,398 | 5,248 |
| France | 38,155 | 34,851 | 50,327 | 32 |
| Sweden | 59,317 | 63,147 | 50,117 | 43 |
| Germany 4/ | 102,563 | 46,027 | 41,995 | 496 |
| BELGIUM | 23,994 | 22,240 | 21,324 | - |
| Switzerland | 4,547 | 10,374 | 19,437 | 25,043 |
| CZECHOSLOVAKIA | 102,068 | 100,734 | 18,671 | - |

1/ Partly (about 10 percent) estimated.
2/ Incomplete; represents exports of enameled utensils and aluminum ware. Total exports were probably valued at about $1,000,000 in the years 1937-39.
3/ Includes imports valued at $5,185 from Mexico and $4,776 from Canada.
4/ Includes Austria beginning 1938.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff: Act of 1930 | United States tariff: 1945 rate | Proposed negotiating country |
|---|---|---|---|
| Par. 339 | | | |
| Enameled utensils | 5¢ lb. + 30% ad val. | 5¢ lb. + 15% ad val. 1/ | CZECHOSLOVAKIA |
| Aluminum ware | 8½¢ lb. + 40% ad val. | 8½¢ lb. + 40% ad val. | UNITED KINGDOM |
| Copper utensils | 40% ad val. | 30% ad val. 2/ | do. |
| Brass utensils | 40% ad val. | 30% ad val. 3/ | CHINA |
| Pewter utensils | 40% ad val. | 25% ad val. 4/ | U.K., CHINA |
| Antimony utensils | 40% ad val. | 40% ad val. | CHINA |
| Carbonated water siphons | 40% ad val. | 25% ad val. 4/ | UNITED KINGDOM |
| Meat and food choppers | 40% ad val. | 40% ad val. | CZECHOSLOVAKIA |
| Hollow or flat ware, n.s.p.f. | 40% ad val. | 40% ad val. | BELGIUM |
| Base metal wares, n.e.s. | 40% ad val. | 40% ad val. | CZECHOSLOVAKIA, UNITED KINGDOM |

1/ Trade agreement with Sweden, effective August 1935.
2/ Trade agreement with Iran, effective June 1944.
3/ Trade agreement with Iran, effective June 1944.
4/ Trade agreement with the United Kingdom, effective January 1939.
Note.- The above rates are applicable whether or not electrical heating elements are constituent parts of the utensils.

BASE METAL UTENSILS, NOT PLATED WITH PLATINUM, GOLD, OR SILVER--Continued

| | Duty or ad valorem equivalent of duty paid on imports in 1939 (Percent) |
|---|---|
| Enameled utensils | 37 |
| Aluminum ware | 54 |
| Copper utensils | 1/ 35 |
| Brass utensils | 1/ 40 |
| Pewter utensils | 25 |
| Antimony utensils | 40 |
| Carbonated water siphons | 25 |
| Meat and food choppers | 2/ 32 |
| Hollow or flat ware, n.s.p.f. | 40 |
| Base metal wares, n.e.s. | 40 |

1/ Subsequently reduced to 30 percent ad valorem.
2/ Duty was 30 percent ad valorem, April 16, 1938 to April 22, 1939 under trade agreement with Czechoslovakia.

Comment

Under the Tariff Act of 1930, except for enameled utensils and aluminum ware which are dutiable at compound rates, base metal utensils not plated with platinum, gold, or silver, and not specially provided for were dutiable at 40 percent ad valorem. Under the terms of various trade agreements duties on many of these products have been reduced to 30 percent ad valorem, and on a few to 25 percent ad valorem. Exceptions are unclassified items imported under the provisions for base metal wares, not enumerated separately, and hollow or flat wares, not specially provided for; aluminum ware, and antimony utensils. Aluminum ware and antimony utensils were formerly imported chiefly from Germany and Japan, respectively. Most kitchen and household utensils are classifiable according to the chief value of the raw materials of which they are composed; a few have been segregated for special tariff consideration.

This group of products includes thousands of items made of a variety of metals and alloys. Many articles are plated or coated to prevent corrosion, to add to their usefulness as containers of food, or to enhance their appearance, and some of them are made with electrical heating elements. Cooking utensils, the major items, are commonly made of enameled iron or steel or aluminum, and to a somewhat lesser extent of cast iron, stainless steel, and copper. Innumerable other utensils and implements are made of the above materials, also of brass, bronze, nickel silver, pewter, and antimony.

Most of these products are of simple construction and readily adaptable to modern mechanized methods of production. Articles are stamped, pressed, spun, or otherwise formed from sheet metal, or cast in molds or dies. Plating and coating methods are relatively simple; formed articles are dipped in molten coating materials, such as tin and zinc, or enameled or electroplated with chromium, nickel, or other metal.

More than 100 companies located in almost every state of the Union, produce kitchen and household utensils. A few firms are capitalized at over one million dollars, but the majority are small. Some concerns specialize in certain types of products, such as enameled utensils or aluminum ware; others make kitchen and household utensils and implements along with a complete line of hardware and other items. In 1939 enameled utensils and aluminum ware comprised slightly over 50 percent of the total value of production, while other types of base metal ware, including utensils with electrical heating elements, comprised the remainder.

BASE METAL UTENSILS, NOT PLATED WITH PLATINUM, GOLD, OR SILVER--Continued

The United States is in a favorable position with respect to this industry. Supplies of most of the raw materials are ample. Iron is one of the most abundant and cheapest materials used in the production of these articles, and the preeminent position of the United States in the aluminum field has given the domestic aluminum-ware industry a dominant position in the trade. A few raw materials are imported, notably cryolite (used in the production of enamel), nickel, and tin. The industry is unusually stable; sales of the more expensive types of ware and nonessential items decline during periods of depressed income, but the volume of sales of staple goods remains fairly constant.

Imports consist of both cooking utensils and miscellaneous implements and specialties. In prewar years enameled utensils and aluminum ware comprised between 15 and 25 percent of the total value of imports, while brass, copper, antimony, pewter, steel, iron, and alloyed metal wares comprised the remainder. Many of the latter were specialties characteristic of particular countries. Imports have come largely from Asiatic countries—China, Japan, Egypt, Iran, and India, and from industrialized European nations—the United Kingdom, Germany, Czechoslovakia, Sweden, and Belgium. Brass utensils have come chiefly from China, enameled utensils from Sweden and Czechoslovakia, copper utensils from the United Kingdom, antimony ware from Japan, and meat and food choppers from Sweden, Czechoslovakia, and Germany.

Owing to the heavy military demands for metals during the war, domestic production was drastically curtailed. Most of the output consisted of utensils to meet military requirements. Imports declined sharply. Imports from some former important suppliers, notably Germany, Japan, and Czechoslovakia, were practically nil, while other countries, such as Switzerland, Canada, and Mexico, increased in importance as suppliers of the limited imports.

The competitive position of domestic products varies with individual items. Generally speaking, the United States is in a strong competitive position with respect to most of these articles, especially utensils with electrical heating elements, imports of which are insignificant. On the other hand, where labor is of major importance , European and Asiatic products have some advantage. Some articles have been imported in fairly substantial volume over a period of years. By and large, they have consisted of low-and medium-priced specialties from numerous countries. China, the United Kingdom, and Czechoslovakia are probably of most potential importance in the trade in the near future.

In prewar years the United States was unable to compete with other countries in foreign markets, where it had to meet competition from the lower-priced wares of European and Asiatic competitors. During the war, exports of enameled ware in particular increased to Latin American countries, partly because of the lack of other suppliers and partly because some of these countries could not obtain from the United States their customary supplies of semimanufactured sheets and plates for their home industries.

Separate digests cover the individual classes of products included herein.

HOLLOW OR FLAT WARE, NOT SPECIALLY PROVIDED FOR
(See digest on Base metal utensils, n.e.s.)

Stat. import class (1939): 620.97

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | BELGIUM | United Kingdom | France | Germany 1/ |
| | Value (dollars) | | | | | | |
| 1937 | Not available 2/ | Not available 3/ | 62,199 | 8,272 | 9,703 | 3,938 | 11,860 |
| 1938 | | | 43,319 | 10,652 | 3,833 | 2,240 | 5,395 |
| 1939 | | | 31,387 | 9,542 | 4,619 | 3,596 | 3,088 |
| 1943 | | | 4/ 1,242 | - | 207 | - | 2 |

1/ Includes Austria beginning 1938.
2/ Estimated at 1 million dollars annually.
3/ Estimated at $50,000 to $100,000 annually.
4/ Principally from Mexico and Switzerland.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 339 | | | |
| Hollow or flat ware, of iron or steel, not specially provided for ---------- | 40 | 40 | BELGIUM |

Comment

Articles classified herein include iron and steel products such as kettles, pans, boilers, fireplace sets, and incense burners. Many of these products are cast wares, coated, glazed, or tinned, to prevent corrosion.

While domestic production of these articles is believed to be relatively large in comparison with imports, the domestic industry has met with increasing competition in recent years from similar articles made in the United States enameled or made of aluminum or other nonferrous metals, including nickel silver and chromium-plated ware. The production of stainless-steel stamped or spun ware is a comparatively recent development, and these products are relatively high-priced. The domestic industry includes a few firms who make specialized lines, such as cast-iron griddles and Dutch ovens and stainless-steel cooking utensils and appliances, and other firms who manufacture a diversified line of household utensils. Little of this ware was made during the war.

Imports consist chiefly of specialties. In recent prewar years Belgium and the United Kingdom were the leading sources of imports; Germany was formerly an important supplier.

The United States is in a favorable position with respect to foreign competition in most of these products; in others, competition is on a price basis.

While export data are not segregated, domestic exports are believed to be larger than imports. Competition in foreign markets has been chiefly from

countries, with established foreign markets, including Belgium, Czechoslovakia, and Germany. Moreover, there is usually some production of this type of ware by home industries in most foreign countries.

UTENSILS AND HOLLOW OR FLATWARE--ENAMELED

Stat. import classes (1939): 6141.0, 709.51

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Sweden | CZECHO-SLOVAKIA | Japan | Germany 1/ |
| | Quantity (pounds) | | | | | | |
| 1937 | Not available | 1,524,257 | 900,364 | 195,375 | 243,057 | 363,797 | 65,381 |
| 1938 | | 1,441,281 | 562,940 | 188,111 | 181,836 | 130,548 | 25,153 |
| 1939 | | 2,306,897 | 275,140 | 148,036 | 52,752 | 30,690 | 14,517 |
| 1943 | | 2/ 6,217,243 | 3/ 673 | - | - | - | 131 |
| | Value (dollars) | | | | | | |
| 1937 | 19,657,849 | 282,720 | 161,068 | 51,545 | 56,544 | 26,068 | 19,618 |
| 1938 | n.a. | 277,748 | 121,125 | 53,520 | 39,048 | 10,433 | 9,526 |
| 1939 | 16,564,999 | 408,574 | 65,906 | 41,371 | 10,122 | 3,431 | 6,004 |
| 1943 | 20,448,539 | 2/ 1,790,177 | 3/ 269 | - | - | - | 23 |

1/ Includes Austria beginning 1938.
2/ Includes 411,559 pounds valued at $88,415 exported under lend-lease.
3/ Principally from Canada.
Source: Official statistics of the U. S. Department of Commerce.

| | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 339: | | | |
| Table, household, kitchen, and hospital utensils, and hollow or flatware, not specially provided for: | | | |
| Composed of iron or steel and enameled or glazed with vitreous glasses, whether or not containing electrical heating elements | 5¢ lb. + 30% ad val. | 5¢ lb. + 15% ad val. 1/ | CZECHOSLOVAKIA |

1/ Trade agreements with Sweden and Czechoslovakia effective August 1935, and April 1938, respectively. The concession under the agreement with Czechoslovakia terminated in April 1939, but the modified rate remained in effect pursuant to agreement with Sweden.

Note.- The duty on imports in 1937 was equivalent to 45 percent ad valorem and in 1939 to 37 percent [war years not significant].

## Comment

Enameled utensils include products designed for general household use (cooking utensils, pails, dishpans, etc.) and hospital ware (basins, sterilizers, etc.). They are made of sheet-steel blanks dipped in frit or enamel and then baked at high temperatures. Heavy power-driven stamping and other machines are required for economical production.

UTENSILS AND HOLLOW OR FLATWARE-ENAMELED--Continued

The quality of enameled utensils depends upon many factors, including the preparation of forms, and the composition and application of the enamel. Materials used in the enamel composition include quartz, feldspar, borax, cryolite, and others. In the production of enameled utensils of the finest quality as many as three coats of enamel may be applied; mottled-gray enamel (granite ware) requires but one coat. All grades of enameled utensils are produced in the United States.

United States production, which is the largest in the world, is centered in Ohio, Pennsylvania, Indiana, Wisconsin, West Virginia, New York, and California. About 25 firms comprise the industry. The United States has ample supplies of the necessary raw materials, with the exception of cryolite which is imported duty-free from Greenland.

The foreign value of United States imports in 1937 was somewhat less than 1 percent of the value of the domestic production and was less than the value of United States exports. Sweden, Germany, and Czechoslovakia were the principal sources of prewar imports which have consisted both of high and low quality goods. Imports with electrical heating elements have been inconsequential.

During the war the domestic industry, with certain governmental limitations as to supplies of raw materials was engaged in the production of hospital and general-use wares, including utensils for military use and export. Hospital ware represented about 15 percent of the total annual value of production, and general-use ware, 85 percent. About 19 percent of the total value of all types was for military use and for export.

Before the war the United States encountered keen competition in foreign markets from Sweden, Germany, Czechoslovakia, Poland, and Japan. The export trade of German, Czechoslovakian, and Polish producers was promoted by the formation of an international cartel in 1935. Canada and Cuba were the leading markets for United States exports, but about 70 countries participated. During the war since other important suppliers of foreign markets were inactive, and since countries with limited home industries were unable to obtain the necessary raw materials from abroad, United States export trade expanded sharply.

After the reduction in the duty by the trade agreement with Sweden, effective August 1935, imports averaged materially larger than during the immediately preceding years. Part of this increase, however, may have been due to greater total demand accompanying recovery from the depression.

Stat. import classes (1939): 630.40, 709.52.

United States production, exports, and imports, in specified years, 1931-43

| Year | Production 1/ | Domestic exports | Imports for consumption from — | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Italy | Germany 2/ | Japan | UNITED KINGDOM |
| | Quantity (pounds) | | | | | | |
| 1931 - | | n.a. | 117,649 | 5,335 | 87,264 | 7,482 | 8,625 |
| 1933 - | Not | n.a. | 101,755 | 4,378 | 66,232 | 19,951 | 7,729 |
| 1935 - | avail- | n.a. | 81,549 | 1,905 | 47,558 | 16,058 | 10,599 |
| 1937 - | | 765,810 | 86,114 | 4,600 | 30,163 | 23,187 | 15,545 |
| 1938 - | able | 67?,290 | 37,129 | 5,389 | 7,164 | 10,259 | 1,635 |
| 1939 - | | 537,532 | 26,776 | 6,435 | 6,703 | 5,472 | 1,134 |
| 1943 - | | 3/64,157 | 4/7,094 | - | 36 | - | - |
| | Value (dollars) | | | | | | |
| 1931 - | 22,278,985 | 386,744 | 61,711 | 4,531 | 37,355 | 3,711 | 10,584 |
| 1933 - | 16,400,412 | 197,333 | 44,959 | 3,745 | 25,606 | 5,251 | 7,820 |
| 1935 - | 24,550,818 | 302,153 | 51,226 | 1,747 | 26,409 | 6,285 | 13,593 |
| 1937 - | 36,671,639 | 411,864 | 48,815 | 3,641 | 18,707 | 9,516 | 6,757 |
| 1938 - | n.a. | 364,240 | 23,747 | 4,003 | 4,548 | 5,317 | 2,288 |
| 1939 - | 34,727,547 | 302,406 | 16,191 | 4,857 | 4,026 | 2,709 | 511 |
| 1943 - | n.a. | 3/54,342 | 4/ 7,253 | - | 15 | - | - |

1/ Except electrical appliances. 2/ Includes Austria beginning 1938.
3/ Includes 35,606 pounds valued at $36,302 exported under lend-lease.
4/ Includes 4,115 pounds valued at $3,891 imported from Canada and 2,893 pounds valued at $3,316 imported from Mexico.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 339 | | | |
| Table, household, kitchen, and hospital utensils, and hollow or flatware, not specially provided for: | | | |
| Composed wholly or in chief value of aluminum, whether or not containing electrical heating elements -- | 8½¢ lb + 40% ad val. | 8½¢ lb. + 40% ad val. | UNITED KINGDOM |

Note.- The average ad valorem equivalent of the duty was about 55 percent on total imports in 1931-43.

## Comment

Because of their fitness for household needs--lightness combined with strength, durability, excellent thermal conductivity, pleasing color, and relatively low price--aluminum utensils have replaced many similar articles formerly made of iron or steel and tinplate. Cooking utensils, the most important item, represented 85 percent of the total value of domestic production of aluminum kitchen, hospital, and household ware in 1939. Some of these products, such as percolators and toasters, are constructed with electrical heating elements. Other household products made of aluminum include trays, cups, and dishes. A recent development is the use of colored aluminum in the fabrication of dishes.

ALUMINUM UTENSILS AND HOLLOW OR FLATWARE-Continued

Aluminum utensils are stamped, cast, or spun. Stamped ware, made from sheet aluminum, comprises the bulk of domestic output. The quality of aluminum utensils depends among other factors, on the quality and gage of the aluminum alloy sheet used in their production and on the finish of the product. Design in some articles is an important sales factor.

The domestic industry consists of about 30 plants employing about 8,000 workers. Plants are located in Pennsylvania, Ohio, Wisconsin, Illinois, Michigan, New Jersey, California, and Georgia. Both high-priced cast and spun wared and lower-priced stamped utensils, that sell in chain stores, are produced by the domestic industry.

Because of the preeminent position of the United States in the aluminum field, the aluminum household utensil industry is in favorable position with respect to raw materials. During the war not only were new alloys and manufacturing processes developed, but the price of aluminum declined.

Germany was by far the principal source of imports before the war. The United Kingdom ranked second, and a number of other countries, notably Japan, Italy, Swedon, and Switzerland, participated in the trade. The decline in imports, which became most noticeable in the late 1930's, was attributable in part to the preparation for war in foreign countries and the conservation of aluminum for military uses.

During the war little aluminum ware was made in the United States for civilian use, since aluminum and available manpower and manufacturing equipment were required for military production. Such utensils as were made were chiefly for military kitchens and the equipment of soldiers. Aluminum ware of all types made in the industry in 1943 was valued at approximately $60 million.

Government regulations controlling the production of aluminum cooking utensils, kitchen ware, and household articles for civilian use were revoked in May 1945. Although this facilitated production of aluminum ware, reconversion has been retarded somewhat by shortages of basic forms and shapes. Many of the facilities used in the production of fabricated aluminum for war purposes are not adaptable to turning out forms for civilian use. There also has been some shortage of labor in the particular localities where these products are customarily made.

Many of the aluminum articles imported in the past consisted of noncompetitive specialties, whereas domestic output consisted largely of essential kitchen and household articles. In foreign markets American products competed with lower-priced articles of foreign producers, notably those of Germany and Japan. Canada, the Union of South Africa, the Philippines, Mexico, and South American countries were the leading prewar export markets for aluminum ware of United States manufacture. Exports went to 75 countries in 1939, by 1943 this trade had been greatly reduced, and shipments were made to less than half that number.

# COPPER UTENSILS AND HOLLOW OR FLATWARE

Stat. import classes (1939): 643.09, 709.53

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | China | UNITED KINGDOM | Iran | France |
| | Value (dollars) | | | | | | |
| 1937 | Not available 1/ | Not available 2/ | 56,100 | 8,775 | 22,739 | 3,652 | 2,930 |
| 1938 | | | 41,985 | 6,786 | 10,737 | 3,395 | 2,468 |
| 1939 | | | 106,715 | 42,582 | 30,389 | 5,886 | 5,629 |
| 1943 | | | 5,718 | 35 | 680 | 3,211 | - |

1/ Estimated at 1 to 2 million dollars annually. 2/ Known to be small.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 339 | | | |
| Table, household, kitchen, and hospital utensils, and hollow or flatware, not specially provided for: | | | |
| Composed wholly or in chief value of copper (including copper in alloys other than brass), not plated with platinum, gold, or silver, and not specially provided for | 40 | 1/ 30 | UNITED KINGDOM |

1/ Trade agreement with Iran, effective June 1944; previously reduced to 35 percent in the United Kingdom trade agreement, effective January 1939. In addition to the tariff duty, articles in chief value of copper are subject to an import excise tax of 3 cents per pound under sec. 3425 of the Internal Revenue Code. This tax has been in effect since June 21, 1932.

## Comment

Copper articles and utensils are produced in the United States by two principal types of producers: Individual craftsmen and artists, who make specialties and ornamental goods such as vases and trays, and manufacturers who make cooking and other household utensils of copper. Copper cooking utensils are plates with tin, chromium, pewter, or other base metal. They are relatively high priced and the market is, therefore, limited. A substantial proportion of the domestic output of copper cooking utensils is for the hotel and restaurant trade. During the war, few of these articles were made as copper was required in the production of many war products.

Imports have included both high- and low-priced specialties as well as household utensils. In recent prewar years China and the United Kingdom were the chief sources of imports. Iran generally supplied about 5 percent of the total value, and many other countries supplied small quantities. The United States has been the principal export market for a number of countries, including Iran.

Imports of utensils and ornamental articles of copper are largely noncompetitive with articles of copper produced in this country. Many of these articles, such as those from China, British India, Iran, and other countries of the Orient are made by native craftsmen, and are of distinctive designs and ornamentation.

BRASS UTENSILS AND HOLLOW OR FLATWARE
(Other brass manufactures are dutiable under par. 397)

Stat. import class (1939): 6458.8

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from— | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | CHINA | India 1/ | United Kingdom | France |
| | Value (dollars) | | | | | | |
| 1937 - | Not available 2/ | Not available 3/ | 170,244 | 103,568 | 7,322 | 8,984 | 5,556 |
| 1938 - | | | 110,403 | 67,850 | 7,614 | 7,986 | 5,587 |
| 1939 - | | | 125,713 | 80,572 | 15,869 | 10,376 | 6,878 |
| 1943 - | | | 4/ 9,164 | 28 | 34 | 2,201 | - |

1/ Includes Burma in 1937. 2/ Estimated at 2 to 3 million dollars annually.
3/ Probably small. 4/ Includes imports from Switzerland valued at $6,233.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 339 | Percent ad valorem | | |
| Table, household, kitchen, and hospital utensils, and hollow or flatware, not plated with platinum, gold, or silver, and not specially provided for: | | | |
| Composed wholly or in chief value of brass ---------- | 40 | 1/ 30 | CHINA |

1/ Trade agreement with Iran, effective June 1944. In addition to the tariff duty, these articles are subject to an import-excise tax of 3 cents per pound under section 3425 of the Internal Revenue Code.

Comment

United States production of brass utensils consists of a variety of household articles, such as urns, bowls, vases, rods, book ends, trays, coaster sets, and ecclesiastical wares. Many of these articles are made from sheet brass by stamping or pressing. They are made in the United States by manufacturers engaged in the production of a wide range of articles, including specialties made from other metals. There is also some production by small firms making specialties for the arts trade. Few of these articles were made during the war because of the scarcity of brass.

United States imports include both ordinary household wares and specialties, and high- as well as low-priced articles. China, British India, the United Kingdom, France, Japan, and Switzerland were sources of imports in prewar years. Imports from the United Kingdom and other industrialized nations are very similar to domestic products; imports from the Orient are largely hand-made and are less competitive with factory-made American and European products.

BRASS UTENSILS AND HOLLOW OR FLATWARE--Continued

War conditions have made it impossible thus far to determine the effect of the reduction in the duty on brass utensils by the Trade Agreement with Iran effective in 1944. It is probable that when normal conditions are restored, total imports at the 30 percent rate will be somewhat larger than would enter at a 40 percent rate, and that the benefit of the concession will go largely to China.

# ANTIMONY UTENSILS AND HOLLOW OR FLATWARE

Stat. import class (1939): 679.66

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | Japan | CHINA | |
| | Value (dollars) | | | | | |
| 1937 --- | Not available 1/ | Not available 2/ | 61,304 | 58,398 | 2,737 | |
| 1938 --- | | | 14,218 | 12,612 | 1,532 | |
| 1939 --- | | | 11,153 | 10,901 | 252 | |
| 1943 --- | | | n.a. | | - | |

1/ Estimated at $100,000 annually. 2/ Negligible.
Source: Official statistics of the U. S. Department of Commerce except as noted.

| | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 339: | | | |
| Table, household, kitchen, and hospital utensils, and hollow or flat ware, n.s.p.f.*** wholly or in chief value of ** base metal, not plated with platinum, gold, or silver, and not specially provided for: wholly or in chief value of antimony ---------- | 40 | 40 | CHINA |

## Comment

The chief use of antimony in the utensil field in the United States is as an alloy of white metals from which articles to be plated with silver or other metals are formed. Little household ware is made of unplated antimony alloys.

Production and trade in antimony utensils and household wares is centered in the Orient, where the tin-white color and metallic luster of antimony have led to its use in alloys from which articles such as bowls and vases are fabricated. Japan and China, (formerly the largest producers of antimony ware), developed sorld markets for these articles before the war. Many of them are handicraft specialties of characteristic design and ornamentation.

In wartime little antimony is used for household utensils on account of antimony requirements for military purposes. In peacetime, substantial quantities of antimony are required in the production of storage batteries, cable coverings, type metals, and chemical compounds. These uses may influence future trade in antimony utensils.

Although imported antimony utensils encounter little competition from similar utensils produced in the United States, they do compete to some extent with utensils made of other materials.

PEWTER UTENSILS AND HOLLOW OR FLAT WARE (OTHER PEWTER MANUFACTURES ARE DUTIABLE UNDER PAR.397)

Stat. import classes (1939): 679.67, 709.54

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | CHINA | France | Japan | UNITED KINGDOM |
| | Value (dollars) | | | | | | |
| 1937 | 102,434 | Not available 1/ | n.a. | - | - | - | - |
| 1938 | n.a. | | n.a. | - | - | - | - |
| 1939 | 125,462 | | 21,642 | 16,383 | 1,169 | 1,161 | 911 |
| 1943 | n.a. | | 935 | 231 | 2 | - | 460 |

1/ Known to be negligible.
Source: Official statistics of the U. S. Department of Commerce.

| | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 339: | | | |
| Table, household, kitchen, and hospital utensils, and hollow or flat ware, not specially provided for ***composed wholly or in chief value of ** base metal, and not specially provided for: | | | |
| Composed wholly or in chief value of pewter, not plated with platinum, gold, or silver: | | | |
| If containing electrical heating elements | 40 | 1/ 25 | UNITED KINGDOM |
| Other | 40 | 1/ 25 | UNITED KINGDOM CHINA |

1/ Trade agreement with the United Kingdom, effective January 1939.

Comment

Pewter is a soft, easily worked alloy composed chiefly of tin and lead or copper, and small quantities of antimony, bismuth, zinc, or other metals. Pewter has been used from early times in the fabrication of table and household utensils and ecclesiastical goods. It has been displaced to a large extent by other metals and alloys better fitted for hard usage or for plating with silver. Sales of pewter articles fluctuate with decrees of fashion. While output in most recent years has been valued at slightly over $100,000 annually, it reached a value of $3,726,000 in 1931, including hollow ware valued at $2,930,000 and novelties valued at $796,000. Little pewter ware was made during the war.

Pewter is usually a product of the silverware industry, to which it is closely allied both as to type of product and manufacturing operations. A few small companies confine their products to pewter ware for the arts trade.

Imports are of two distinct types: Articles supplied by European countries that are similar to those made in the United States, and distinctively designed ware from the Orient, chiefly China. Imports from the Orient are not as subject to fashion limitations as European and American ware are. Chinese pewter ware is competitive with the American and European products to only a limited degree. It is marketed through somewhat different channels--gift shops and bazarrs--and imports are likely to be fairly stable.

BASE METAL UTENSILS, N. E. S.
(See digest on hollow or flat ware, not specially provided for, par. 339)

Stat. import classes (1939): 679.70, 709.59

United States production, exports, and imports, 1937-39 and 1943

| Country | 1937 | 1938 | 1939 | 1943 |
|---|---|---|---|---|
| | Value (dollars) | | | |
| Production | Estimated 25,000,000 annually | | | n.s. |
| Domestic exports | Estimated 500,000 to 1,000,000 annually | | | n.a. |
| Imports for consumption from: | | | | |
| Total, all countries | 354,615 | 234,093 | 174,045 | 1/22,140 |
| Japan | 144,217 | 68,257 | 48,930 | 216 |
| France | 22,741 | 23,002 | 31,479 | 4 |
| Germany 2/ | 47,514 | 18,661 | 26,341 | 347 |
| UNITED KINGDOM | 33,749 | 29,506 | 14,803 | 1,696 |
| CZECHOSLOVAKIA | 34,758 | 29,086 | 3,139 | - |

1/ Includes imports valued at $18,440 from Switzerland.
2/ Includes Austria beginning 1938.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff: Act of 1930 | United States tariff: 1945 rate | Proposed negotiating country |
|---|---|---|---|
| | Percent ad valorem | | |
| Par. 339: | | | |
| Table, household, and kitchen and hospital utensils, and hollow or flat ware, composed wholly or in chief value of base metals, not plated with platinum, gold, or silver, and n.s.p.f.: | | | |
| If containing electrical heating elements | 40 | 40 | UNITED KINGDOM |
| Other | 40 | 40 | CZECHOSLOVAKIA |

Comment

The household and kitchen utensils here discussed include a great variety of products made of iron or steel galvanized or plated with chromium, nickel, copper, or brass and of nonferrous metals and alloys, such as nickel silver, lead, and zinc. These articles are largely stamped or formed from sheet metal. The United States has a large production of kitchen and household utensils such as pots and pans, cocktail sets, utility boxes, book ends, strainers, graters, racks, trays, and holders, made of these materials. Some of these products are made with electrical heating elements.

The domestic industry consists of a few highly mechanized firms who make diversified lines, and numerous small concerns who specialize in certain types of ware. The industry is distributed throughout the United States.

Imports include some cooking utensils, but specialties and implements, such as pot cleaners, boxes and stands of various kinds, strainers, vegetable miners, trays, and coaster sets, predominate. Czechoslovakia has been an important supplier of the latter type of articles, but Japan, Germany, France, China, and the United Kingdom were also sources of imports in prewar years. Occasionally there are small importations of products with electrical heating elements.

BASE METAL UTENSILS, N. E. S.-Continued

During the war, many of the raw materials, particularly those used in coating or plating these articles, were scarce, and production was limited.

The United States is in a strong competitive position with respect to most of these articles. Many of them are made in highly mechanized plants, and essential raw materials in peacetimes are ample. Domestic exports in some lines are large; in others, the United States meets strong competition in foreign markets from European and Asiatic producers.

# CARBONATED WATER SIPHONS
(Metal parts are classified in par. 397)

Stat. import class (1939): 679.68

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports |
|---|---|---|---|
| | Value (dollars) | | |
| 1937 | | | n.a. |
| 1938 | Not available 1/ | Not available | n.a. |
| 1939 | | | None |
| 1943 | | | None |

1/ Estimated at $100,000 annually, 1937-39.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff: Act of 1930 | United States tariff: 1945 rate | Proposed negotiating country |
|---|---|---|---|
| | Percent ad valorem | | |
| Par. 339 | | | |
| Carbonated water siphons, of copper, brass, steel, or other base metal (except aluminum), n.s.p.f. | 40 | 1/ 25 | UNITED KINGDOM |

1/ Trade agreement with the United Kingdom, effective January 1939.

## Comment

Official statistics of United States production and exports of carbonated water siphons are not available, and there have been no imports since the import classification for these products was established January 1, 1939.

There are two types of siphons used as containers and dispensers for carbonated water: A simple form consisting of a glass bottle with a metal head, and a refillable type equipped with a cartridge holder. Siphons are often encased with wire mesh or enveloped with a metal cover to enable them to withstand pressure; they may also be of all-metal construction. Metal parts of carbonated water siphons are dutiable under provisions of paragraph 397.

About six companies in the United States, located mainly in New York City and vicinity, engage primarily in the production of siphon heads for sale to bottling-equipment houses, and one or two firms manufacture siphon heads in addition to allied metal products. Two or three concerns manufacture the refillable type of siphon. Glass bottles for siphons (pressure ware) are purchased from bottle makers. The assembled product is sold to the bottling industry and liquor-supply trade. Refillable siphons are sold by manufacturers to retail liquor, department, hardware, and drug stores.

The competitive position of the United States industry appears to be strong. Following the repeal of the 18th amendment in 1933, substantial shipments were received from the United Kingdom. This situation appears to have been temporary, as imports, except for limited shipments of parts (par. 397), ceased as soon as producers were in a position to meet the demand.

HOUSEHOLD MEAT AND FOOD CHOPPERS

Stat. import class (1939): 780.48

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from— | | | |
|---|---|---|---|---|---|---|
| | | | All countries | Sweden | CZECHO-SLOVAKIA | Germany 1/ |
| | Quantity (number) | | | | | |
| 1937 | Not available | Not available 2/ | n.a. | 1,692 | 8,616 | 1,838 |
| 1938 | | | 3/ 12,146 | 2,211 | 3,450 | 1,065 |
| 1939 | | | 6,766 | - | - | - |
| 1943 | | | - | - | - | - |
| | Value (dollars) | | | | | |
| 1937 | Not available 4/ | Not available 2/ | n.a. | 2,613 | 7,424 | 2,097 |
| 1938 | | | 3/ 12,134 | 3,721 | 2,837 | 770 |
| 1939 | | | 7,350 | - | - | - |
| 1943 | | | - | - | - | - |

1/ Includes Austria beginning 1938.
2/ Exports probably exceed imports.
3/ For the period April 16 to December 31.
4/ Estimated at 1 million dollars annually.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 339 | Percent ad valorem | | |
| Meat and food choppers which are household or kitchen utensils, wholly or in chief value of base metal, not specially provided for | 40 | 40 | CZECHOSLOVAKIA |

Note.- In trade agreement with Czechoslovakia, effective April 16, 1938 to April 21, 1939, the duty was 30 percent ad valorem.

## Comment

Meat and food choppers used in household kitchens are made chiefly of cast iron tinned to prevent corrosion. They vary in constructional details but ordinarily consist of a hopper, a cylindrical barrel, and a rotating cutter.

The domestic industry consists of about eight manufacturers, located in Connecticut and Pennsylvania. Value of prewar production probably exceeded 1 million dollars annually. Several of these firms produce only meat and food choppers; others produce choppers along with a diversified line of hardware and household goods. The ratio of exports to production is believed to be small for the industry as a whole, but varies among the several producers. Total exports probably exceed imports.

Sweden, Czechoslovakia, and Germany have supplied the bulk of the small imports. In prewar years Czechoslovakia was the leading supplier of small and medium-sized choppers and Sweden led in the higher-priced larger sizes.

HOUSEHOLD MEAT AND FOOD CHOPPERS-Continued

Imported choppers are closely similar to the domestic, in many cases the general appearance being almost identical. Small and medium-sized choppers predominate both in domestic production and imports. The larger domestic manufacturers no doubt have some advantage in marketing methods. However, foreign producers probably have the advantage of lower labor costs.

Stat. import classes (1939): 620.00, 620.02, 985.60, 985.62

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from— | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Canada | |
| | Value (dollars) | | | | | |
| 1937 ---- | | 423,254 | 52,431 | 21,384 | 13,722 | |
| 1938 ---- | 100,000,000 | 436,932 | 34,767 | 13,275 | 8,722 | |
| 1939 ---- | annually 1/ | 400,192 | 45,795 | 20,470 | 17,765 | |
| 1943 ---- | | 319,684 | 20,275 | 2,726 | 16,355 | |

1/ Estimated.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 341 | | | |
| Steel plates, stereotype plates, electrotype plates, half-tone plates, photogravure plates, photo-engraved plates, and plates of other materials, engraved or otherwise prepared for printing, and plates of iron or steel engraved or fashioned for use in the production of designs, patterns, or impressions on glass in the process of manufacturing plate or other glass; lithographic plates of stone or other material, engraved, drawn, or prepared ---- | 25 | 25 | UNITED KINGDOM |

Comment

Plates for printing and for transferring designs, pictures, and patterns to paper and other materials are customarily used in the countries where they are produced; they do not enter into international trade to a great extent. Plates which enter international trade include bookplates, plates for producing pictures and manuscripts for foreign editions, and reproductions of works of art.

Production of plates for printing, photoengraving, and for transferring designs, pictures, and patterns to paper and other materials is an important industry in the United States. Statistical data are incomplete, but production is known to be many times larger than exports, and imports are very small in comparison with domestic output.

United States foreign trade in both directions has been chiefly with the United Kingdom and Canada, although many countries have participated to some degree. Imports have consisted chiefly of plates of steel, copper, zinc, or other metal engraved or otherwise prepared for printing or transferring designs, and have been intended chiefly for use in the reproduction of books, manuscripts, and the like. Imports of plates engraved or fashioned for use in the production of designs, patterns, or impressions on glass, as well as imports of engraved lithographic stone have been negligible.

PLATES FOR PRINTING-Continued

Plates for printing: United States imports for consumption, by kinds, with principal sources in 1939

| Item | Total value | Principal source |
|---|---|---|
| Engraved plates for designs on glass | $47 | Mexico $47 |
| Engraved plates of steel for printing, n.e.s. | 5,071 | Canada, $4,310; Germany, 1/ 419 |
| Electrotype, stereotype, halftone, photogravure, photoengraved, and plates of other material than steel, engraved or otherwise prepared for printing | 38,077 | UNITED KINGDOM, $17,888; Canada, $13,455 |
| Lithographic plates of stone or other material engraved, drawn, or prepared | 2,600 | UNITED KINGDOM, $2,574 |

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

# UMBRELLA RIBS, STRETCHERS, AND TUBES

Stat. import class (1939): 679.65

United States production, exports, and imports, 1937-39 and 1943

| Year | Production 1/ | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | Japan | UNITED KINGDOM | Germany 2/ |
| | Quantity (dozens) | | | | | |
| 1937 | Not available | Not available 3/ | 2,943 | 2,660 | 12 | 271 |
| 1938 | | | 50 | - | - | 50 |
| 1939 | | | 101 | 90 | 11 | - |
| 1943 | | | - | - | - | - |
| | Value (dollars) | | | | | |
| 1937 | 1,849,769 | Not available 3/ | 4,804 | 2,382 | 30 | 2,392 |
| 1938 | n.a. | | 484 | - | - | 484 |
| 1939 | 2,002,181 | | 191 | 160 | 31 | - |
| 1943 | n.a. | | - | - | - | - |

1/ Figures shown represent values of frames.
2/ Includes Austria beginning 1938. 3/ Probably negligible.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 342 | | | |
| Umbrella and parasol ribs and stretchers, composed wholly or in chief value of iron, steel, or other metal, in frames or otherwise, and tubes for umbrellas, wholly or partly finished | 60 | 60 | UNITED KINGDOM |

## Comment

Umbrella ribs, stretchers, and tubes, essential components of assembled umbrellas, are produced in the United States by about six manufacturers, located in Pennsylvania, New Jersey, and New York. They are produced largely by automatic and semiautomatic machinery, but the final assembly into umbrella frames is by hand.

Frames vary in price with the quality of the material, the number of ribs, and the finish. Finishes are in black, bronze, aluminum, silver, or gilt, the latter being used in some of the better grades of women's umbrellas.

The small imports in the past have come chiefly from Japan and Germany, and have included both metal frames and parts with low unit values and higher-priced specialties, such as a spring-type frame from Germany.

# MACHINE NEEDLES, EXCEPT KNITTING

Stat. import classes (1939): 6162.1 and 6162.3

United States production, exports and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from— | | | |
|---|---|---|---|---|---|---|
| | | | All countries | Germany 1/ | NETHERLANDS | UNITED KINGDOM |
| | Quantity (thousands) | | | | | |
| 1937---- | Not available | 18,787 | 6,169 | 2,731 | 2,342 | 1,061 |
| 1938---- | | 16,660 | 3,658 | 1,965 | 1,105 | 524 |
| 1939---- | | 22,900 | 3,403 | 1,995 | 746 | 589 |
| 1943---- | | 2/ 47,402 | 2/ 974 | - | - | 953 |
| | Value (dollars) | | | | | |
| 1937---- | 4/ 2,750,000 | 337,908 | 56,136 | 22,021 | 21,598 | 11,893 |
| 1938---- | n.a. | 323,404 | 37,207 | 16,572 | 14,353 | 5,980 |
| 1939---- | 4/ 2,500,000 | 449,873 | 34,192 | 18,962 | 8,295 | 6,238 |
| 1943---- | n.a. | 2/ 950,787 | 3/ 6,568 | - | - | 4,403 |

1/ Includes Austria, beginning 1938. 2/ Includes 2,771 thousands valued at $86,495 exported under lend-lease. 3/ Includes 308 thousands valued at $1,935 imported from Switzerland. 4/ Estimated.

Source: Official statistics of the U. S. Department of Commerce except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 343 | | | |
| Machine needles, except knitting: | | | |
| Shoe machine---------- ) | $1.15 per 1,000 + 40% ad val. | $1.15 per 1,000 + 40% ad val. | UNITED KINGDOM |
| Sewing and embroidery machine--- ) | | | UNITED KINGDOM and NETHERLANDS |

Note.- In 1938 the ad valorem equivalent of the rate on shoe machine needles was 46 percent; in 1939 the ad valorem equivalent of the rate on sewing and embroidery machine needles was 52 percent.

## Comment

Needles for sewing, shoe, and embroidery machines are made in a great variety of shapes and sizes: straight, curved, with eyes or hooks, etc., for many kinds of work. Skilled workmanship is necessary to produce needles in close conformity to the uniform shape, size, finish, and temper required for use in machines running at high speed.

The Singer Sewing Machine Co., operating large American and British machine and needle factories, is the world's largest maker of sewing-machine needles. Before the war the United Kingdom was the largest foreign buyer of United States sewing-machine needles, usually taking 4 or 5 percent of the domestic output. Exports greatly exceed imports.

The machine manufacturers who make needles benefit from a tendency of users of their machines to buy needles from the same source. Embroidery machines, except certain small types, are not made in the United States; they are imported only from Germany and Switzerland and to some extent from the United Kingdom. Although imports of embroidery needles are not separately reported, it is probable that the needles used in these foreign-built machines are also mostly of foreign origin. Embroidery machine needles are used much less widely than sewing-machine and shoe-machine needles.

MACHINE NEEDLES, EXCEPT KNITTING-Continued

Machine needles, except knitting: United States imports for consumption, by kind and principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Shoe machine | $18 | Germany 1/, $18 |
| Sewing and embroidery machine | 34,134 | Germany 1/, $18,944; NETHERLANDS, $8,295; UNITED KINGDOM, $6,238 |

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

NEEDLES, HAND (CROCHET, KNITTING, AND TAPE NEEDLES); BODKINS, AND NEEDLE CASES OR BOOKS /HAND-SEWING AND DARNING NEEDLES ARE FREE OF DUTY, PAR. 1724./

Stat. import classes (1939): 6162.0, 6162.7, 6162.8, 6162.9

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Japan | Germany 1/ | Czecho-slovakia |
| | Value (dollars) | | | | | | |
| 1937-- | n.a. | Negligible | 142,889 | 59,031 | 29,612 | 42,123 | 15,387 |
| 1938-- | n.a. | | 99,021 | 48,400 | 15,034 | 25,929 | 9,581 |
| 1939 | 2/500,000 | | 109,127 | 74,171 | 13,959 | 10,388 | 902 |
| 1943-- | n.a. | | 5,467 | 5,351 | - | - | - |

1/ Includes Austria beginning 1938. 2/ Estimated.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 343 | | | |
| Crochet needles or hooks -------- | $1.15 per M + 40% ad val. | $1.15 per M + 40% ad val. | UNITED KINGDOM |
| Tape, knitting, and all other needles, n.s.p.f., and bodkings of metal ---------- | 45% ad val. | 1/ 30% ad val. | UNITED KINGDOM |
| Needle cases or needle books furnished with assortments of needles or combinations of needles and other articles: | | | |
| If furnished with assortments of needles only and valued at not less than $1.25 per dozen cases or books ---------- | 45% ad val. | 1/ 30% ad val. | UNITED KINGDOM |
| All other ---------- | 45% ad val. | 45% ad val. | UNITED KINGDOM |

1/ Trade agreement with the United Kingdom, effective January 1939.
Note.- The duty on the imports of crochet needles or hooks in 1939 was equivalent to 46.5 percent ad valorem.

## Comment

Needles are commonly made of steel. Crochet and knitting needles, important types of needles used in making garments and other articles by hand, are also made of aluminum, celluloid, casein, artificial horn, and bone. They are made in a variety of sizes and materials, depending upon their use. Tape needles and bodkins are usually made of steel, nickel plated.

Consumption of crochet and knitting needles is dependent upon the vogue for hand-made garments; tape needles and bodkins, as well as needle cases fitted with assortments of needles and other articles, are limited in demand.

NEEDLES, HAND (CROCHET, KNITTING, AND TAPE NEEDLES); BODKINS, AND NEEDLE CASES OR BOOKS /HAND-SEWING AND DARNING NEEDLES ARE FREE OF DUTY, PAR. 1724/--Continued

Only a relatively few companies in the United States make crochet and knitting needles and related articles as their principal products; a somewhat larger number make needles in conjunction with other products. Ordinary hand-sewing and darning needles, such as are imported in needle cases or books, are not made in the United States. Domestic manufacture of needle cases or books is for the most part an assembling process carried on by comparatively small concerns engaged in a variety of related activities.

There are no statistical data respecting exports. Such exports as occur are incidental to the trade in notions.

The United Kingdom, Germany, and Czechoslovakia have been the chief sources of crochet and knitting needles; the United Kingdom, of tape needles and bodkins; and Japan, of needle cases or books furnished with assortments of needles and other articles. (See table below.)

During the war imports, chiefly from the United Kingdom, declined to negligible quantities.

In the postwar period competition between British and United States manufacturers for the somewhat limited domestic market for crochet and knitting needles is likely to be resumed.

Crochet, tape, knitting, and other needles, n.s.p.f.; bodkins of metal, and needle cases or books: United States imports for consumption, by kinds, and by principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Crochet needles or hooks | $39,078 | UNITED KINGDOM, $31,031; Germany, 1/ $7,219; Czechoslovakia, $359 |
| Tape, knitting, and other needles, n.s.p.f., and bodkins of metal | 54,086 | UNITED KINGDOM, $41,373; France, $9,137; Germany, 1/ $2,447; Czechoslovakia, $543 |
| Needle cases or books, with assortments of needles or combinations of needles and other articles: | | |
| Furnished with assortments of needles only, valued $1.25 or more per dozen | 1,170 | UNITED KINGDOM, $729; Germany, 1/ $342; Japan, $99 |
| Other | 14,793 | Japan, $13,345; UNITED KINGDOM, $1,038; Germany, 1/ $380. |

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

# CYLINDRICAL STEEL ROLLS, GROUND AND POLISHED

Stat. import classes (1939): 620.16 and 620.06

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | France | Sweden | Canada |
| | Quantity (pounds) | | | | | | |
| 1937 | Not available | Not available | 21,667 | 20,859 | - | 192 | 550 |
| 1938 | | | 21,431 | 20,160 | 1,200 | - | - |
| 1939 | | | - | - | - | - | - |
| 1943 | | | - | - | - | - | - |
| | Value (dollars) | | | | | | |
| 1937 | Not available | Not available | 7,635 | 6,747 | - | 291 | 468 |
| 1938 | | | 7,071 | 5,692 | 1,316 | - | - |
| 1939 | | | - | - | - | - | - |
| 1943 | | | - | - | - | - | - |

Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 344 | | | |
| Cylindrical steel rolls, valued at 25¢ and over per pound: | | | |
| Containing alloy---------- | 40 | 40 | UNITED KINGDOM |
| Other---------- | 25 | 25 | do. |

## Comment

The cylindrical steel rolls here discussed are used to roll cold strip steel, aluminum and copper sheets and foil, and, by the jewelry trade, to roll platinum, gold, and other precious metals. They are of fine quality, have a high polish, and are used where fine finishes are required. These rolls are made in many sizes--mostly according to the specifications of the user. Standard rolls used in the rolling mills of the steel industry are valued at less than 25 cents per pound and are therefore not considered in this digest.

Imports declined in the decade before the war. It may be that developing manufacturing techniques in the United States have narrowed the advantages of lower costs and finer workmanship formerly held by foreign producers. Transportation cost is not a particularly important factor since the rolls have a high unit value.

United States imports of steel rolls from the United Kingdom in 1937 and 1938 contained no alloy, but amounted to 85 percent of the total value of imports. Only 12 percent of total imports contained alloy steel.

# HARNESS AND SADDLERY HARDWARE

Stat. import classes (1939): 679.20-23

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | | |
| | Value (dollars) | | | | | |
| 1937 ---- | 3,357,161 | 127,766 | 21,226 | 18,311 | | |
| 1938 ---- | n.a. | 84,848 | 17,068 | 16,825 | | |
| 1939 ---- | 2,565,990 | 104,375 | 15,848 | 14,504 | | |
| 1943 ---- | n.a. | 108,308 | 2,801 | 2,334 | | |

Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate 1/ | |
| | Percent ad valorem | | |
| Par. 345 | | | |
| Harness hardware: buckles, rings, snaps, bits, swivels and other articles of metal: | | | |
| Not plated with gold or silver --- | 35 | 20 | UNITED KINGDOM |
| Plated with gold or silver ------- | 60 | 30 | do. |
| Saddlery or riding bridle hardware of metal: | | | |
| Not plated with gold or silver --- | 50 | 25 | do. |
| Plated with gold or silver ------- | 60 | 30 | do. |

1/ Trade agreement with the United Kingdom, effective January 1939.

## Comment

Harness and saddlery hardware includes such metal articles as are used in the manufacture of saddles, bridles, and other harness, as well as in the replacement and repair of this equipment.

Production has declined in the United States because of the displacement of horses by automobiles, trucks, and tractors. United States exports have been mostly to Cuba, Canada, and Mexico and have far exceeded imports.

The United Kingdom has been the principal source of United States imports, which have consisted mostly of unplated bits, spurs, stirrups, chains, buckles, and rings. Imports of plated articles have been negligible. The imports are mostly of special design used for racing, polo, and allied sports. They cannot be considered as competitive with the great bulk of domestic output. Imports by kinds in 1939 are shown in the following table.

In 1939, after the sharp reductions in the duties by the trade agreement with the United Kingdom, effective January 1 of that year, imports were somewhat smaller than in the two preceding years, but this may have been due to the generally disturbed political and economic conditions in the United Kingdom.

HARNESS AND SADDLERY HARDWARE--Continued

Harness and saddlery hardware: United States imports for consumption, by principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Harness hardware: | | |
| Not plated with gold or silver | $3,863 | UNITED KINGDOM, $2,694; Germany, $1,151 1/ |
| Plated with gold or silver | 38 | Mexico, $38 |
| Saddlery hardware: | | |
| Not plated with gold or silver | 11,639 | UNITED KINGDOM, $11,502 |
| Plated with gold or silver | 308 | UNITED KINGDOM, $308 |

1/ Rate of duty 35 percent. Germany includes Austria

Source: Official statistics of the U. S. Department of Commerce.

# METAL BUCKLES

Stat. import classes (1939): 679.15, 679.16, and 679.17

United States production, exports and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from— | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | CZECHO-SLOVAKIA | France |
| | Quantity (thousand) | | | | | |
| 1937 | Not available | Not available | 5,109 | 815 | 4,285 | - |
| 1938 | | | 2,558 | 773 | 1,758 | 27 |
| 1939 | | | 1,864 | 1,280 | 350 | 230 |
| 1943 | | | 1/ 383 | - | - | - |
| | Value (dollars) | | | | | |
| 1937 | Not available 2/ | Not available | 13,025 | 7,722 | 5,174 | - |
| 1938 | | | 11,383 | 8,584 | 2,506 | 293 |
| 1939 | | | 13,058 | 11,966 | 545 | 503 |
| 1943 | | | 1/ 2,576 | - | - | - |

1/ Includes 376 thousand buckles valued at $2,481, imported from Mexico.
2/ Known to be much in excess of imports.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 346 | | | |
| Belt buckles, trouser buckles, and waistcoat buckles, shoe or slipper buckles, and parts thereof, made wholly or partly of iron, steel, or other base metal: | | | |
| Valued at not more than 20 cents per hundred | 5¢ per 100 + 20% ad val. | 1/ 5¢ per 100 + 20% ad val. | CZECHOSLOVAKIA |
| Valued at more than 20 and not more than 50 cents per hundred | 10¢ per 100 + 20% ad val. | 2/ 7¢ per 100 + 10% ad val. | UNITED KINGDOM |
| Valued at more than 50 cents and not more than $1.66-2/3 per hundred | 15¢ per 100 + 20% ad val. | 2/ 10¢ per 100+ 10% ad val. | do. |

1/ Reduced to 3½¢ per hundred plus 10 percent ad valorem in the trade agreement with Czechoslovakia, effective from April 1938 to April 1939.
2/ Trade agreement with the United Kingdom, effective January 1939.
Note.- The duty on total imports of metal buckles valued at not more than 20 cents per hundred was equivalent to 62 percent ad valorem in 1937 and 51 percent in 1939; on those valued at more than 20 and not more than 50 cents per hundred, 46 percent in 1937 and 27 percent in 1939; and on those valued at more than 50 cents and not more than $1.66-2/3 per hundred, 33 percent in 1937 and 20 percent in 1939.

METAL BUCKLES - Continued

Comment

The belt, trouser, waistcoat, and shoe or slipper buckles provided for in paragraph 346 are made principally of iron, steel wire, brass wire, sheet steel, sheet brass, or a combination of these materials. They are usually japanned, nickled, bronzed, or otherwise coated or plated, and polished.

The manufacture of buckles in the United States is carried on largely in conjunction with the manufacture of such small wares of metal as snap fasteners, buttons, and metal trimmings for suspenders and garters. The value of domestic production is not available, but it is believed to be much greater than the value of imports.

United States imports of buckles valued not over 20 cents per hundred came chiefly from Germany until 1934, when Czechoslovakia became the principal supplier. Buckles valued over 20 cents and not over 50 cents per hundred have come principally from the United Kingdom, except in 1938 and 1939 when Czechoslovakia was the source of more than half of the imports. Buckles valued over 50 cents and not over $1.66-2/3 per hundred have been imported mainly from the United Kingdom, and have constituted the most important class in terms of value. The following table shows United States imports for consumption of buckles of base metal, for the years 1937 and 1939.

Buckles of base metal: United States imports for consumption, by value brackets, in 1937 and 1939

| Item | Quantity | Value | Principal source |
|---|---|---|---|
| | Number | | 1937 |
| Buckles for belts, trousers, waistcoats, shoes or slippers, of iron, steel, or base metal, and parts: | 5,108,937 | $13,025 | |
| Valued not over 20 cents per hundred | 4,378,661 | 5,227 | CZECHOSLOVAKIA, 4,282,160 buckles and $5,161. |
| Valued over 20 cents, not over 50 cents per hundred | 64,512 | 247 | UNITED KINGDOM, 61,920 buckles and $234. |
| Valued over 50 cents, not over $1.66-2/3 per hundred | 665,764 | 7,551 | UNITED KINGDOM, 656,116 buckles and $7,422. |
| | | | 1939 |
| Buckles for belts, trousers, waistcoats, shoes or slippers, of iron, steel, or base metal, and parts: | 1,864,207 | 13,058 | |
| Valued not over 20 cents per hundred | 615,344 | 650 | CZECHOSLOVAKIA, 300,000 buckles and $301; France, 200,000 buckles and $231. |
| Valued over 20 cents, not over 50 cents per hundred | 98,960 | 397 | Czechoslovakia, 50,000 buckles and $244; UNITED KINGDOM, 48,960 buckles and $153. |
| Valued over 50 cents, not over $1.66-2/3 per hundred | 1,149,903 | 12,011 | UNITED KINGDOM, 1,115,769 buckles and $11,695. |

Source: Official statistics of the U. S. Department of Commerce.

METAL BUCKLES - Continued

The processes employed in the manufacture of buckles are about the same abroad as in the United States, and the lower cost of labor, which represents a considerable part of the total cost, tends to give an advantage to foreign producers. The duties on the two higher value brackets were reduced by the trade agreement with the United Kingdom effective January 1939. The value of imports from the United Kingdom in 1939 was considerably larger than in previous years. However, probably mainly because of the disturbed political and economic conditions at that time and the concomitant decline in imports from Czechoslovakia, which enter principally under the lowest value bracket, total imports in that year were no larger than entered in 1937.

Stat. import class (1939): 679.31

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from— | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Germany 1/ | United Kingdom | CZECHO-SLOVAKIA | Canada |
| | Quantity (pounds) | | | | | | |
| 1937- | Not available | Not available (see text) | 1,319 | - | 10 | 1,309 | - |
| 1938- | | | 3,368 | 152 | 26 | 1,519 | 1,669 |
| 1939- | | | 417 | 413 | 4 | - | - |
| 1943- | | | - | - | - | - | - |
| | Value (dollars) | | | | | | |
| 1937- | 246,696 | Not available (see text) | 1,688 | - | 6 | 1,682 | - |
| 1938- | n.a. | | 3,323 | 187 | 18 | 1,647 | 1,463 |
| 1939- | 285,773 | | 415 | 411 | 4 | - | - |
| 1943- | n.a. | | - | - | - | - | - |

1/ Includes Austria beginning 1938.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff 1/ | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 347 | | | |
| Hooks and eyes, wholly or in chief value of metal, whether loose, carded, or otherwise, including weight of cards, cartons, and immediate wrappings and labels - | 4⅓¢ lb. + 25% ad val. | 4½¢ lb. + 25% ad val. | CZECHOSLOVAKIA |

1/ The ad valorem equivalent rate of duty based on 1939 imports amounted to 30 percent.

## Comment

Hooks and eyes are garment fasteners made of wire. They have declined sharply in popularity since the early 1930's when annual production in the United States was valued at over 1 million dollars. This decline has been due to the increasing use of snap fasteners and more recently to the use of slide fasteners (zippers).

Domestic exports are not reported separately in official statistics, but the trade claims that occasionally exports have been fairly substantial.

The principal foreign producers have been Germany, England, Belgium, and Czechoslovakia. For many years the first two countries were the principal sources of imports into the United States, but in the late 1930's Czechoslovakia became the leading supplier.

# SNAP FASTENERS, CLASPS, AND PARTS, NOT PLATED WITH PRECIOUS METALS, VALUED NOT MORE THAN $1.66-2/3 PER HUNDRED

Stat. import classes (1939): 679.51-679.541

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from--- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | Germany 1/ | CZECHO-SLOVAKIA | Japan |
| | Value (dollars) | | | | | |
| 1937 | n.a. | Not available 2/ | 64,731 | 36,386 | 24,111 | 3,224 |
| 1938 | n.a. | | 71,931 | 39,891 | 31,211 | 536 |
| 1939 | 2,452,527 | | 97,823 | 94,104 | - | 3,494 |
| 1943 | n.a. | | 3/239 | - | - | - |

1/ Includes Austria beginning 1938. 2/ Probably smaller than imports.
3/ Includes $159 imported from Canada.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 348 | | | |
| Snap fasteners, clasps, and parts, not plated with gold, silver, or platinum, valued not more than $1.66-2/3 per hundred: | | | |
| Sew-on fasteners and parts: | | | |
| Not mounted on tape | 55 | 55 | CZECHOSLOVAKIA |
| Mounted on tape | 60 | 60 | Do. |
| Other fasteners, clasps, and parts: | | | |
| Not mounted on tape | 55 | 1/55 | Do. |
| Mounted on tape | 60 | 2/60 | Do. |

1/ Rate reduced to 30 percent in trade agreement with Czechoslovakia, effective April 1938, but terminated April 1939.
2/ Rate reduced to 35 percent in trade agreement with Czechoslovakia, effective April 1938, but terminated April 1939.

## Comment

There are two types of snap fasteners, sew-on and rivet. The sew-on fasteners are used principally on wearing apparel. Rivet fasteners, as the name implies, are riveted to the article; they are used on a wide variety of articles such as gloves, galoshes, pocket books, belts, caps, and umbrellas. Among the articles included as clasps are spring rings, hooks for the ends of belts or necklaces, certain types of jeweler's supplies, and swivel snap hooks for watch chains.

United States production declined in value from 8 million dollars in 1919 to about 5.5 million dollars in 1929 and to less than 2.5 million dollars in 1939, due largely to changes in the styles of women's clothes and to the increasing popularity of slide fasteners (zippers). Domestic exports are small in comparison with production.

Before the war the leading foreign producers were Germany, Austria, Czechoslovakia, and France. Substantial quantities were also made in Japan. The principal suppliers of United States imports were Germany and Czechoslovakia, Japan ranking a poor third. The bulk of the imports consisted of fasteners of the rivet-on type.

METAL BUTTONS

Stat. import classes (1939): 973.30-973.33 (4 classes)

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Germany 1/ | CZECHO-SLOVAKIA | France |
| | Quantity (gross) | | | | | | |
| 1937 | 6,000,000 | Not | n.a. | - | - | - | - |
| 1938 | n.a. | avail- | n.a. | - | - | - | - |
| 1939 | 6,966,000 | able | 17,090 | 12,157 | 2,705 | 2,193 | 33 |
| 1943 | n.a. | (see text) | 2/ 142 | - | - | - | - |
| | Value (dollars) | | | | | | |
| 1937 | 2,617,000 | Not | 69,175 | 26,000 | 1,200 | 40,001 | 731 |
| 1938 | n.a. | avail- | 59,241 | 18,718 | 4,333 | 34,909 | 1,269 |
| 1939 | 3,241,000 | able | 16,323 | 13,343 | 1,287 | 1,026 | 656 |
| 1943 | n.a. | (see text) | 2/ 734 | - | - | - | - |

1/ Includes Austria beginning 1938.

2/ Free for Government use, 105 gross, valued at $476, from Canada; also includes dutiable imports amounting to 35 gross, valued at $241, imported from Mexico.

Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 349 | | | |
| Metal trouser buttons (except steel) and nickel bar buttons | 1/12¢ line per gross | 1/12¢ line per gross 1/ | UNITED KINGDOM, CZECHOSLOVAKIA |
| Steel trouser buttons | 1/4¢ line per gross | 1/4¢ line per gross | do. |
| Buttons of metal, n.s.p.f. | 3/4¢ line per gross plus 15% ad val. | 1/2¢ line per gross plus 10% ad val. 1/ 2/ | do. |
| Metal buttons embossed with a design, device, pattern, or lettering | 45% ad val. | 45% ad val. 3/ | do. |

1/ Subject also to internal revenue tax under sec. 3425 of the Internal Revenue Code, if containing copper. The tax is 3 cents per pound on articles in chief value of copper, and on articles containing 4 percent or more of copper by weight, but not in chief value thereof, it is 3 percent ad valorem or 3/4 cent per pound, whichever is lower.

2/ Trade agreement with the United Kingdom, effective January 1939.

3/ Reduced to 35 percent ad valorem by agreement with Czechoslovakia, effective from April 1938 to April 1939.

Note.- The ad valorem equivalents of the duties on imports in 1939 were as follows: Steel trouser buttons--38 percent; buttons of metal, n.s.p.f.--24 percent. There have been no imports of metal trouser buttons (except steel) and nickel bar buttons since 1930; in that year the duty was equivalent to 22 percent ad valorem.

Comment.

Metal buttons are made of iron, steel, nickel, aluminum, and brass. They are made in a variety of different shapes and may be plain, plated with gold or silver, or embossed with a design, pattern, or lettering. The lower priced plain buttons are used largely on work clothing. During the 1930's embossed buttons accounted for from 42 to 72 percent of the domestic output of all metal buttons, and in the same period embossed buttons comprised from 67 to 93 percent of total imports of metal bussons. Gold and silver plated buttons are of comparatively minor importance in both domestic production and imports.

At the present time there are about 20 concerns in the United States engaged in the production of metal buttons. Some of these concerns produce metal buttons in conjunction with other small metal products, whereas others limit their production to metal and other kinds of buttons. In recent years metal buttons have been displaced to an increasing extent by buttons made of plastics materials.

Statistics of United States exports of metal buttons are not available, but exports are probably larger than imports.

The ratio of imports to domestic production of plain metal buttons was about 2 percent in 1935 and 2½ percent in 1937. The ratio of imports of embossed buttons to domestic production has been consistently higher than the ratio for plain metal buttons. Imports in prewar years came principally from Czechoslovakia and the United Kingdom. The effects of the reductions in duty provided in the trade agreement with Czechoslovakia and the United Kingdom cannot be accurately determined because of preparations for and the outbreak of war.

Metal buttons: United States imports for consumption, by kinds, with principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Embossed with a design, device, pattern, or lettering | $12,900 | UNITED KINGDOM, $10,569; Germany, 1/ $1,237; France, $649; CZECHOSLOVAKIA, $384 |
| Trouser, steel | 642 | CZECHOSLOVAKIA, $642 |
| Metal buttons, n.s.p.f. | 2,781 | UNITED KINGDOM, $2,774 |

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

# METAL PINS

Stat. import classes (1939): 679.33-679.36

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Germany 1/ | CZECHO-SLOVAKIA | Japan |
| | Value (dollars) | | | | | | |
| 1937 | 5,456,370 | Not available | 171,303 | 63,417 | 32,547 | 41,549 | 28,546 |
| 1938 | n.a. | | 146,444 | 46,019 | 25,092 | 59,608 | 14,866 |
| 1939 | 6,296,358 | | 130,076 | 57,998 | 36,284 | 25,330 | 9,000 |
| 1943 | 2/ 5,000,000 | | 3/ 170,073 | 692 | - | - | - |

1/ Includes Austria beginning 1938. 2/ Estimated.
3/ Includes $160,406 from Mexico and $8,672 from Argentina.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | Jan.1 1945 rate | |
| | Percent ad valorem | | |
| Par. 350 | | | |
| Metal pins: | | | |
| Common or dressmakers' | 35 | 1/ 30 | UNITED KINGDOM |
| Hair | 35 | 1/ 30 | do. |
| Safety | 35 | 2/ 35 | CZECHOSLOVAKIA |
| Other | 35 | 35 | UNITED KINGDOM |

1/ Trade agreement with United Kingdom, effective January 1939.
2/ Safety pins were dutiable at 30 percent under the trade agreement with Czechoslovakia from April 1938 to April 1939.

## Comment

Metal pins classified in paragraph 350 are of base metal, principally steel and brass, not plated with gold or silver. A few, such as hat pins and florist pins, have heads of glass, paste, or fused enamel. Pins of precious metal or plated with precious metal are classified as jewelry in paragraph 1527.

The United States is one of the leading world producers. Practically all types of pins are made in this country in substantial quantities, except hat, florist, mourning, and similar pins with heads of glass, paste, or enamel, the demand for which is comparatively small and is supplied principally by imports. The bulk of the demand for common, hair, and safety pins is supplied by the domestic manufacturers. Probably three-fourths of these pins are produced in Connecticut. In 1939, the last year for which complete production data are available, domestic output was valued at over $6,296,000, of which $1,530,000 was for common pins, $3,139,000 for hairpins and $1,627,000 for safetypins. Production of miscellaneous types is not reported separately but is known to be small.

The principal foreign markets for the American pins are in nearby countries, but the total amount exported is small in comparison with domestic production or with exports from the United Kingdom and Germany, the leading countries in the international trade. Prewar exports from Germany were generally two to three times greater than those from the United Kingdom, probably principally because of Germany's ability to undersell the British in most foreign markets.

METAL PINS-Continued

After World War I, imports into the United States increased steadily until 1929, even though the duty was increased from 20 percent to 35 percent in the act of 1922. After 1929 there was a continuous decline in imports, both in total value and in relation to domestic production, although the duty remained unchanged. Before World War II, imports were principally from the United Kingdom, Germany, Czechoslovakia, and Japan, the last two countries becoming important late in the interwar period. Pins imported from the United Kingdom were of high quality, comparing favorably with those produced in the United States. They consisted principally of common or dressmaker pins and hairpins. Before 1933 safetypins were imported principally from Germany, but after that year they came principally from Czechoslovakia. Miscellaneous types were principally from Germany and Japan. With normal sources cut off by the war, Canada became the leading supplier of United States imports of common pins and hairpins in 1943. Mexico supplied the few safetypins that were imported, and the United Kingdom and Spain the miscellaneous pins. Imports by kind and principal sources for 1939 are shown below.

Metal pins: United States imports for consumption, by kind, and by principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Common or dressmaker pins | $30,468 | UNITED KINGDOM, $23,521; Czechoslovakia, $5,102; Germany, 1/ $1,675. |
| Metal hairpins | 33,110 | UNITED KINGDOM, $26,959; Germany, 1/ $4,442; Japan, $1,406 |
| Safetypins | 42,558 | CZECHOSLOVAKIA, $19,666; Germany, 1/ $18,288; United Kingdom, $3,150 |
| Other pins (hat, florist, etc.) | 23,940 | Germany, 1/ $11,879; Japan, $6,140; UNITED KINGDOM, $4,368 |

1/ Includes Austria.
Source: Official statistics of the U. S. Department of Commerce.

In the trade agreement with the United Kingdom, effective January 1, 1939, the duty on common pins and hairpins was reduced by one-seventh, but the reduction did not apply to imports from Germany (which had then absorbed Czechoslovakia). Imports from the United Kingdom in 1939 were considerably larger than in 1938 but smaller than in 1937.

# PENS, METALLIC, EXCEPT GOLD

Stat. import classes (1939): 9790.1, 9790.2, 9790.3

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | | |
| | Quantity (gross) | | | | | |
| 1937 ---- | 1,518,109 | 149,598 | 354,828 | 351,434 | | |
| 1938 ---- | n.a. | 123,565 | 221,708 | 220,630 | | |
| 1939 ---- | 1,203,347 | 139,471 | 281,407 | 280,875 | | |
| 1943 ---- | 2,138,000 | 470,692 | 1/ 18,156 | 16,000 | | |
| | Value (dollars) | | | | | |
| 1937 ---- | 1,161,346 | 118,003 | 144,859 | 142,438 | | |
| 1938 ---- | n.a. | 112,757 | 95,051 | 94,345 | | |
| 1939 ---- | 978,808 | 125,040 | 104,549 | 104,390 | | |
| 1943 ---- | n.a. | 283,290 | 1/ 6,444 | 5,902 | | |

1/ Includes 2,135 gross, valued at $517, entered free as an act of international courtesy.

Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Cents per gross | | |
| Par. 351 | | | |
| Pens, not specially provided for: | | | |
| Of plain or carbon steel ------- | 15 | 1/ 12 | UNITED KINGDOM |
| Wholly or in part of other metal ---------- | 18 | 1/ 14 | do. |
| Any of the foregoing with nib and barrel in one piece ------ | 20 | 1/ 15 | do. |

1/ Trade agreement with the United Kingdom, effective January 1939.

Note.- The rate of duty on 1939 imports of pens of plain or carbon steel was equivalent to 35 percent ad valorem; on pens wholly or in part of other metal, 36 percent; and on pens with nib and barrel in one piece, 15 percent.

## Comment

Pens (also known as penpoints or nibs) are commonly made from high-carbon strip steel. Others are made of brass, nickel silver, or stainless steel; some are plated with tin, brass, silver, or gold. Pens with nib and barrel in one piece are largely used by draftsmen and artists.

Approximately 75 percent of domestic consumption of pens is by large users, such as schools, banks, large industrial concerns, and governmental agencies, with whom price is a controlling factor. The remainder of the consumption is mainly by consumers who are influenced relatively more by brand than by price. The trade in pens with nib and barrel in one piece is relatively unimportant because of limited demand.

PENS, METALLIC, EXCEPT GOLD--Continued

The domestic industry consists of five manufacturers, located in New Jersey, Pennsylvania, Connecticut, and New York, who also produce related stationery items. The industry employs about 370 persons.

The United Kingdom has long been the only important source of pens imported into the United States. Approximately 80 percent of the imported pens are the products of two British concerns whose brands are well established in the United States. These concerns have also afforded United States producers severe competition in foreign markets.

Following the outbreak of the war in Europe, sales of domestically produced pens increased as a result of increased industrial activity, cessation of imports, and expanded exports. By 1943 imports had declined to negligible quantities, and United States exports, which represented about one-tenth of production in prewar years, had reached their highest level since 1920.

There is little possibility of increasing the consumption of pens in the United States because of increasing competition from fountain pens and from bookkeeping, billing, computing, and other office machines which have supplanted pens to a large extent. When the British again become active in the trade, United States imports from that country will no doubt be resumed and United States exports will probably decline because of British competition in foreign markets.

Notwithstanding the reduction in the duties by the trade agreement with the United Kingdom, effective January 1, 1939, the ratio of imports of pens to domestic production was no higher in 1939 than in 1937. That fact may, however, have been due in part to disturbed economic conditions in the United Kingdom.

Pens, metallic, except gold: United States imports for consumption, by kinds, by principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Pens of plain or carbon steel | $50,622 | UNITED KINGDOM, $50,608; Germany, 1/ $14 |
| Pens of other metal, n.s.p.f. | 50,500 | UNITED KINGDOM, $50,460; Japan, $34; Canada, $6 |
| With nib and barrel in one piece | 3,427 | UNITED KINGDOM, $3,322; France, $56; Japan, $49 |

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

# CUTTING TOOLS WITH SPECIFIED ALLOYS

Stat. import class (1939): 615.65

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Germany 1/ | Canada |
| | Value (dollars) | | | | | |
| 1937 | Not available (see text) | Not available (see text) | 4,776 | 2,175 | 1,901 | - |
| 1938 | | | 4,142 | 1,796 | 2,119 | 112 |
| 1939 | | | 2,594 | 834 | 609 | 543 |
| 1943 | | | 56,264 | 1,506 | - | 51,822 |

1/ Includes Austria beginning 1938.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 352 Cutting tools of all kinds, containing more than 0.1 percent of vanadium, or more than 0.2 percent of tungsten, molybdenum, or chromium | 60 | 60 | UNITED KINGDOM |

## Comment

The materials in this classification consist of metal-cutting tools of compositions which contain more than 0.1 percent of vanadium, or 0.2 percent of tungsten, molybdenum, or chromium, and which are designed for use in drill presses, gear cutters, lathes, milling machines, planers, shapers, slotters, and tapping and threading machines. To a large extent these are known as high-speed tools, but substitutes for high-speed tool steel, such as tungsten-carbide tools, are within the category.

The value of production of these tools was reported at 44 to 45 million dollars in 1937 and 41 to 42 million in 1939. Actually the total value was somewhat higher, as large establishments produce substantial quantities of cutting tools for their own use and the value of these is in part reported under their costs of materials and supplies.

Imports have been negligible, consisting largely of special types or special alloys. The principal sources have been the United Kingdom and Germany.

Although export data are not comparable to import or production figures, exports are known to exceed imports greatly, since the exports of carbon-steel and alloy-steel tools in these categories amounted to approximately 3 million dollars in 1937 and 1939, and to 2 million in 1938.

ELECTRICAL APPARATUS
(See separate digests on individual groups of electrical apparatus dutiable under par. 353)

Stat. import classes (1939): Various

United States production, exports, and imports, 1937-39 and 1943

| | 1937 | 1938 | 1939 | 1943 |
|---|---|---|---|---|
| | (Value (1,000 dollars) | | | |
| Production | 1,584,679 | n.a. | 1,356,784 | n.a. |
| Domestic exports | 101,935 | 92,294 | 94,551 | 1/ 249,643 |
| Imports for consumption from— | | | | |
| Total all countries | 1,344 | 1,502 | 1,228 | 2/ 26,333 |
| Germany 3/ | 495 | 445 | 580 | 1 |
| UNITED KINGDOM | 301 | 400 | 195 | 1,164 |
| France | 109 | 221 | 146 | 4/ |
| NETHERLANDS | 145 | 222 | 78 | 1 |
| CANADA | 35 | 26 | 46 | 24,966 |
| BELGIUM | 21 | 23 | 35 | 4/ |

1/ Includes 163,650 thousand dollars exported under lend-lease.
2/ Free for Government use, imports valued at 22,907 thousand dollars; also includes imports duty-free as an act of international courtesy, valued at 2,548 thousand dollars.
3/ Includes Austria beginning 1938.
4/ Less than $500.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 353 | | | |
| All articles suitable for producing, rectifying, modifying, controlling, or distributing electrical energy; electrical telegraph (including printing and typewriting), telephone, signaling, radio, welding, ignition, wiring, therapeutic, and X-ray apparatus, instruments (other than laboratory), and devices; and articles having as an essential feature an electrical element or device, such as electric motors, fans, locomotives, portable tools, furnaces, heaters, ovens, ranges, washing machines, refrigerators, and signs; all the foregoing, and parts thereof, unfinished or unfinished, wholly or in chief value of metal, and not specially provided for | 35 | | |
| Articles the duty on which has not been changed by trade agreements: | | | |
| Telephone apparatus | 35 | 35 | UNITED KINGDOM, BELGIUM |
| Wiring devices | 35 | 35 | UNITED KINGDOM |
| Diagnostic and therapeutic apparatus | 35 | 35 | do. |
| Primary cells | 35 | 35 | do. |
| Flashlights | 35 | 35 | do. |
| Switches and switchgear | 35 | 35 | do. |
| Fans and blowers | 35 | 35 | do. |
| Household vacuum cleaners | 35 | 1/35 | do. |

ELECTRICAL APPARATUS-Continued

| Item | United States tariff: Act of 1930 | United States tariff: 1945 rate | Proposed negotiating country |
|---|---|---|---|
| | Percent ad valorem | | |
| Par. 353-Continued | | | |
| Machines, the duty on which has been changed by trade agreements: | | | |
| Calculating machines for multiplying and dividing | 35 | 2/ 25 | UNITED KINGDOM |
| Tobacco cutting and industrial cigarette making machines | 35 | 3/ 22½ | do. |
| Cordage machines | 35 | 3/ 20 | do. |
| Testing machines | 35 | 4/ 20 | do. |
| Machines for packaging pipe tobacco, for wrapping cigarette packages, for wrapping candy, and combination candy cutting and wrapping machines | 35 | 3/ 17½ | do. |
| Internal combustion engines, carburetor type | 35 | 3/ 17½ | do. |
| Other types, horizontal, not over 5,000 lbs. each | 35 | 3/ 17½ | do. |
| Other than horizontal, not over 2,500 lbs. each | 35 | 3/ 17½ | do. |
| Machines with electrical elements which would be dutiable under par. 372 if they could be designed to operate without such element, not specially provided for in the tariff act or in trade agreements | 35 | 3/ 27½ | do. |
| Other electrical goods the duty on which has been changed by trade agreements: | | | |
| Steam boilers (of special specified designs, with electrical elements) | 35 | 4/ 20 | do. |
| Cooking stoves and ranges | 35 | 5/ 17½ | UNITED KINGDOM<br>CANADA |
| Washing machines | 35 | 6/ 17½ | UNITED KINGDOM |
| Telegraph apparatus | 35 | 3/ 17½ | do. |
| X-ray apparatus | 35 | 7/ 17½ | UNITED KINGDOM.<br>NETHERLANDS |
| All other electrical goods dutiable under par. 353 (except those shown above on which duties have not been changed by trade agreements) | 35 | 3/ 25 | UNITED KINGDOM |

1/ Bound in trade agreement with Sweden, effective August 1935.
2/ Trade agreement with Sweden, effective August 1935.
3/ Trade agreement with United Kingdom, effective January 1939.
4/ Trade agreement with Switzerland, effective February 1936.
5/ Trade agreement with Canada, effective January 1936, 25 percent; agreement with Canada, effective January 1939, 17½ percent.
6/ Trade agreement with Canada, effective January 1939.
7/ Trade agreement with Netherlands, effective February 1936.

ELECTRICAL APPARATUS-Continued

Comment

The electrical manufacturing industry includes 20 or more branches producing goods differing widely in character and in the conditions under which they are made and sold. There is some overlapping between electrical and other industries in such products as vacuum cleaners and other electrically operated machines. Before the war the output of the United States industry was somewhat over 2 billion dollars annually. About two-thirds of this value was of products dutiable, when imported, under paragraph 353. The rest fell mostly under other paragraphs of schedule 3, and included insulated wire, automotive electrical equipment, incandescent lamps, lighting fixtures, conduit, storage batteries, and meters. The output of the industry as a whole increased greatly during the war, although production of some goods for civilian supply was stopped. Production, imports, and exports of the principal groups of products in 1939 are shown in the table below.

Electrical apparatus dutiable under paragraph 353: United States production, exports, and imports, 1939, by kinds

(In thousands of dollars)

| | Production | Imports | Exports |
|---|---|---|---|
| Engineering equipment and motors 1/ | 386,658 | 107 | 20,708 |
| Machines with electrical elements 1/ | 289,779 | 254 | 24,484 |
| Radio sets and apparatus | 231,721 | 113 | 22,177 |
| Telephone and telegraph apparatus | 94,496 | 54 | 3,659 |
| Wiring devices | 65,320 | 25 | 2,772 |
| Primary cells and flashlights | 30,095 | 17 | 4,767 |
| Electric ranges | 19,733 | 3 | 379 |
| X-ray and electro-medical apparatus | 18,944 | 85 | 2,201 |
| Calculating machines | 8,608 | 37 | 1,603 |
| All other | 211,430 | 533 | 11,801 |
| Total | 1,356,784 | 1,228 | 94,551 |

1/ Production, imports, and exports only partially comparable.
Source: Official statistics of the U. S. Department of Commerce.

The engineering type of equipment distinguished in the above table includes generators and a large amount of equipment for transmitting and distributing electricity; in addition to the value shown in the table, much similar equipment is produced which, when imported, is dutiable under other paragraphs. The group of machines with electrical elements includes such articles as household refrigerators, cleaners, and portable tools, which contain driving motors, or other electrical elements. The electrical element may be the principal part of such a machine or only a minor part, and the practicability of replacing the electrical element with some other device has usually determined whether the equipment should be dutiable as an electrical or a nonelectrical machine. In various trade agreements the duties on such electrical machines have been made equal to those also reduced on similar nonelectrical machines dutiable under paragraph 372. Wiring devices consist of such articles as lamp sockets, and wall switches and outlets. The item "primary cells" includes mostly common dry cells.

The United States is the world's largest producer and consumer of electrical goods. Two manufacturers, General Electric and Westinghouse, make a nearly full line of electrical products, and together supply about one-quarter of all electrical equipment produced in this country. Their ample capital and equipment enable them to build large, expensive apparatus which smaller companies cannot handle, and to engage intensively in research to promote technical progress. There are nearly 3,000 other producers, ranging from large enterprises to small shops making simple specialties.

ELECTRICAL APPARATUS-Continued

Electrical goods are also made in nearly all other countries, and are a large item in the production of the leading industrial countries. In Great Britain, Germany, Switzerland, and Japan are large firms with manufacturing facilities smaller than those of the United States, but approaching this country in the size and quality of the apparatus which they can build. Sweden, France, Belgium, the Netherlands, Italy, and Czechoslovakia also are equipped to build heavy apparatus in a more limited range. All these countries produce most other kinds of electrical goods. Even in most primarily agricultural countries some electrical goods are made, although usually in a limited range and often of rather low quality.

Some of the factors affecting trade in the more important branches of the industry follow.

Merchandising goods.--The size of the United States market permits mass production of many kinds of electrical goods, such as refrigerators and cleaners, with economies in production cost offsetting lower labor rates often prevailing in foreign countries. Imports of this class of goods are small, while exports are large and go to all parts of the world. Sellers of goods of this kind must maintain adequate servicing facilities, which small-scale operators have difficulty in maintaining.

Engineering equipment.--Heavy equipment such as large generators is not made by mass production methods, but domestic manufacturers offer the advantages of close contact between buyer and seller in planning details of large installations, ease of obtaining replacement parts, known performance, and uniformity of equipment throughout large systems. Purchasers often prefer to contract for much or all of their smaller equipment with the builder of the heavy units. Imports are usually unimportant.

Telephone equipment.--The American Telephone and Telegraph Co., which uses perhaps 80 percent of all domestic equipment, manufactures most of its own requirements through a subsidiary, the Western Electric Co. The remainder of its needs are supplied by several independent manufacturers. The independent telephone operating companies obtain their equipment partly from Western Electric and partly from the independent manufacturers. Imports are largely for the telephone system of Puerto Rico, owned by the International Telephone and Telegraph Company; the apparatus comes from the company's factoyy in Belgium.

X-ray and therapeutic apparatus.--At times X-ray equipment has been imported from the Netherlands because some buyers have favored the product of a particular company in that country. This firm is now manufacturing in the United States. Great Britain has not been a leading producer of X-ray equipment.

Radio apparatus.--In the United States there are many producers of radio equipment, some of whom design, assemble, and sell the sets, while others supply a large portion of the parts used. International trade in radio apparatus is closely controlled by patents on inventions developed in several countries. The United Kingdom is a large producer of radio apparatus, and under the existing patent situation imports into the United States are likely to remain small whatever the rate of duty.

Electrical apparatus not elsewhere classified.--This class, much the largest in imports, but ranking fourth in domestic production, consists of a great variety of goods. Imports include novelties, special kinds of apparatus developed abroad and components and replacement parts for imported apparatus. Imports are so miscellaneous that no one kind is of special importance. Imports so classified also comprise a proportion of goods probably belonging under other electrical classifications which cannot be correctly allocated because of insufficient descriptions on entries.

ELECTRICAL APPARATUS-Continued

Comparison of United States and British industry and trade.--As the entire paragraph is proposed for negotiation with the United Kingdom, a comparison of the electrical industries in the two countries is of interest. Because of differences in reporting, statistics are not always strictly comparable.

British production of electrical apparatus in 1935, the last year it was reported, was valued at about 500 million dollars, roughly one-quarter of that in the United States in 1937. (This comparison includes all equipment reported, wherever dutiable under the United States tariff. It is probably more informative than one between both countries in 1935, as the United Kingdom emerged from the depression sooner than the United States.) British exports in 1937, however, amounted to nearly 100 million dollars, two-thirds as great as United States exports. Of this amount about 70 million dollars worth went to British countries, while the United States supplied the same British countries with about 45 million dollars worth, and exported another 14 million dollars worth to the United Kingdom itself. The United States imported only slightly over $300,000 from the United Kingdom. In the table below are shown United States production in 1937 of electrical apparatus dutiable under paragraph 353, British production of approximately the same goods in 1935, and United States and British exports and imports for 1937.

Electrical goods dutiable under paragraph 353: United States and British production, exports, and imports, 1937

(In thousands of dollars)

| | Production | | Imports | | Exports | |
|---|---|---|---|---|---|---|
| | United States | United Kingdom (1935) | United States | United Kingdom | United States | United Kingdom |
| Engineering equipment and motors | 477,886 | 93,600 | 158 | 3,150 | 18,039 | 27,100 |
| Machines with electrical elements 1/ | 352,847 | 24,600 | 350 | 1,990 | 27,057 | n.a. |
| Radio sets and apparatus | 256,984 | 88,600 | 34 | 6,900 | 32,109 | 8,160 |
| Telephone and telegraph apparatus | 115,883 | 27,900 | 29 | 710 | 3,785 | 10,440 |
| Wiring devices | 61,390 | 16,300 | 23 | n.a. | 2,233 | n.a. |
| Primary cells and flashlights | 24,627 | 17,400 | 51 | n.a. | 4,660 | 1,320 |
| Electric ranges | 26,752 | n.a. | 2/ | n.a. | 400 | n.a. |
| X-ray and electromedical apparatus | 19,272 | 1,400 | 201 | 1,170 | 2,022 | 270 |
| All other 1/ | 249,038 | 26,400 | 498 | n.a. | 11,630 | n.a. |
| | 1,584,679 | 296,200 | 1,344 | n.a. | 101,935 | n.a. |

1/ This classification is not well defined. Only certain important machines are included in the statistics, and figures for United States and United Kingdom are only partially comparable.

2/ Less than 500.

Source: Production from Fifth Census of Production of Great Britain and official statistics of the U. S. Department of Commerce; exports and imports from Trade of United Kingdom and official statistics of the U. S. Department of Commerce.

ELECTRICAL APPARATUS-Continued

Electrical apparatus dutiable under paragraph 353: United States imports for consumption, by kinds, with principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Engineering apparatus | $107,142 | Germany,[1] $75,142; UNITED KINGDOM, $14,171; Canada, $7,395 |
| Machines with electrical elements | 253,657 | UNITED KINGDOM, $114,338; Germany,[1] $84,520; Canada, $21,972 |
| Radio apparatus and electronic tubes | 113,423 | Germany,[1] $62,449; Netherlands, $25,083; UNITED KINGDOM, $12,116 |
| Telephone apparatus | 50,561 | BELGIUM, $33,421; Sweden, $6,804; UNITED KINGDOM, $4,896 |
| Telegraph apparatus | 3,254 | UNITED KINGDOM, $3,164 |
| Wiring devices | 39,458 | Germany,[1] $26,496; Canada, $695; UNITED KINGDOM, $1,558 |
| Primary cells and flashlight cases | 16,587 | Japan $10,813; China, $4,709; Hong Kong, $788 |
| Electric ranges | 2,851 | CANADA, $2,460; UNITED KINGDOM, $169 |
| X-ray and electro-medical apparatus | 85,225 | Germany,[1] $35,956; NETHERLANDS, $26,880; Sweden, $17,229; UNITED KINGDOM, $2,091 |
| Calculating machines | 36,747 | Sweden, $29,502; UNITED KINGDOM, $7,232 |
| Electrical apparatus, n.e.s. | 518,634 | Germany,[1] $293,691; France, $132,497; UNITED KINGDOM, $35,155 |

[1] Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

ENGINEERING ELECTRICAL EQUIPMENT AND MOTORS AND PARTS

Stat. import classes (1939): 709.00, 709.01, 709.02, 709.30, 709.40, 709.43, 709.45, 709.49, 709.89, 7100.2

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption 1/ from— | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Germany 2/ | UNITED KINGDOM | Canada | NETHERLANDS |
| | Value (1,000 dollars) | | | | | | |
| 1937 | 525,274 | 18,039 | 158 | 22 | 64 | 3 | 35 |
| 1938 | n.a. | 19,650 | 57 | 24 | 6 | 2 | 16 |
| 1939 | 432,698 | 20,708 | 107 | 75 | 14 | 7 | 2 |
| 1943 | n.a. | 3/ 94,476 | 4/ 342 | 5/ | 14 | 308 | - |

1/ Not strictly comparable for different years.
2/ Includes Austria beginning 1938.
3/ Includes equipment valued at 64,103 thousand dollars exported under Lend-Lease.
4/ Free for Government use, 206 thousand dollars also includes imports valued at 97 thousand dollars duty-free as an act of international courtesy.
5/ Less than 500 dollars.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 353 | | | |
| Generators and parts | 35 | 1/ 25 | UNITED KINGDOM |
| Transformers and parts | 35 | 1/ 25 | do. |
| Converters and parts | 35 | 1/ 25 | do. |
| Motors, n.e.s. | 35 | 1/ 25 | UNITED KINGDOM, NETHERLANDS |
| Motors, n.e.s., parts | 35 | 1/ 25 | UNITED KINGDOM |
| Furnaces, heaters, and ovens, and parts | 35 | 1/ 25 | do. |
| Switchgear | 35 | 35 | do. |
| Flash steam boilers and parts | 35 | 2/ 20 | do. |
| Fans and blowers, and parts | 35 | 35 | do. |

1/ Trade agreement with the United Kingdom, effective January 1939.
2/ Trade agreement with Switzerland, effective February 1936.

## Comment

This group includes large generators and heavy equipment for power stations and industrial plants, other generators and motors of all sizes, and switchgear (not including the small wall type). The General Electric and Westinghouse companies, having the capital and equipment necessary for building the largest units lead the world production of this apparatus. They also make many of the smaller sizes. A few other domestic firms build heavy apparatus, and a considerable number make the smaller motors and switches used in large quantities. Similar apparatus is made in all industrial countries, but the largest units are produced only in Great Britain, Germany, Switzerland, and Japan. In those countries, as in the United States, very few firms have the capital and facilities for such heavy work.

ENGINEERING ELECTRICAL EQUIPMENT AND MOTORS AND PARTS-Continued

The United States is the largest market and the largest producer of this equipment. Twenty percent of its production was exported in the prewar period, largely to Western Hemisphere countries. Exports to Europe were relatively small, but there was substantial exportation to some British Empire countries. The United Kingdom is far below the United States in production but normally exceeds it in exports, the greater part of which go to British Empire countries. United States exports to the United Kingdom are many times the imports from that country.

Factors other than the duty which tend to restrict imports are the convenience of consultation between seller and buyer on details of large installations, the advantage of having uniform equipment throughout large power systems, the well-known performance of domestic apparatus, the facility of obtaining replacement parts, and the financial relations often existing between buyer and seller in the United States.

Heavy electrical equipment and motors: United States imports for consumption, by kind, with principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Generators and parts | $46,362 | Germany, 1/ $45,264; UNITED KINGDOM, $523 |
| Transformers and parts | 7,148 | UNITED KINGDOM, $5,138 |
| Convertors and parts | 9,483 | UNITED KINGDOM, $2,977; Germany, 1/ $2,780 |
| Motors, n.e.s. | 27,967 | Germany, 1/ $18,499; UNITED KINGDOM, $4,430 |
| Motors, n.e.s., parts | 6,115 | Canada, $1,311; UNITED KINGDOM, $930; NETHERLANDS, $524 |
| Furnaces, heaters, ovens & parts | 4,236 | Germany, 1/ $2,413; UNITED KINGDOM, $21 |
| Switchgear | 1,076 | Canada, $444; Germany, 1/ $331; Denmark, $143 |
| Flash steam boilers, etc. | - | - |
| Fans and blowers | 4,727 | Germany 1/ $4,394; UNITED KINGDOM, $144 |
| Fan and blower parts | 28 | UNITED KINGDOM, $28 |

1/ Includes Austria

Source: Official statistics of the U. S. Department of Commerce.

RADIO AND SIMILAR EQUIPMENT AND PARTS

Stat. import classes (1939): 709.61, 63, 65, and 75

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Germany 1/ | Netherlands | Canada | UNITED KINGDOM |
| | Value (1,000 dollars) | | | | | | |
| 1937 | 256,984 | 32,109 | 34 | 3 | 2 | 1 | 19 |
| 1938 | n.a. | 23,101 | 62 | 18 | 2 | 3 | 26 |
| 1939 | 231,721 | 22,177 | 113 | 62 | 25 | 5 | 12 |
| 1943 | n.a. | 2/ 84,536 | 3/17,889 | 4/ | 1 | 17,377 | 419 |

1/ Includes Austria beginning 1938.
2/ Includes 62,807 thousand dollars exported under lend-lease.
3/ Free for Government use, 16,519 thousand dollars; also includes imports valued at 868 thousand dollars duty-free as an act of international courtesy.
4/ Less than 500 dollars.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 353 | | | |
| ***radio *** apparatus ---------- | 35 | 1/ 25 | UNITED KINGDOM |

1/ Trade agreement with United Kingdom, effective January 1939.

Comment

The manufacture of receiving sets and tubes is the mainstay of the radio industry, accounting for about 85 percent of the total value of the domestic output before the war. There are about 10 leading domestic makers of receiving sets and a number of smaller producers. There are also several manufacturers of tubes, several of transmission and special equipment, and many makers of parts. Basic inventions and many other valuable developments have been patented by the General Electric Co. and its now independent offshoot, the Radio Corporation of America, and by the Hazeltine Corp., a nonmanufacturing engineering and research company. Neither of the two first-mentioned companies is the leader in volume of production of sets, but licenses from the Radio Corporation and Hazeltine are practically a necessity for the production of high-grade sets. Most of the set makers design their circuits and sets, using patents of these firms, manufacture some of their parts, buy the larger part of their components from the specialty makers, and assemble the sets.

Foreign producers, notably Marconi in England, Phillips in Holland, and Telefunken in Germany, also control valuable patents. Since features from many of these patents were needed for the production of high quality sets, patent pools were formed for the cross-licensing of patents. By the pool agreements, certain markets, particularly in continental Europe and the British Empire, were reserved in whole or in part to certain pool members. Other markets, such as Latin America were more competitive. As the pools were based on broad, vital patents, they could guide the activities not only of the originators, but of other manufacturers who had to come to them for licenses. Many unassembled components of sets were not in general covered by this rigid patent control.

So long as the patent situation remains as it is, or is perpetuated by valuable new inventions, imports into the United States are likely to be small, regardless of

the duty. The influence of the pools on international trade is indicated by the recent acquisition, by the North American affiliate of the Dutch Phillips company, of two United States radio manufacturing companies, with their licenses to produce in this country. If the pools and agreements should be dissolved, however, there would be a possibility of increased importation, especially from the large and capable Dutch company.

During the war, production of civilian radio apparatus was stopped, but the output of military radio and related equipment was increased to perhaps 15 times the civilian prewar rate. The design of the ordinary home radio does not seem to have been radically affected by the remarkable developments during the war, but the warborn inventions will doubtless find many applications. A vigorous growth seems assured to the industry also in the newly developing fields of television and frequency modulation. To realize their advantages, new receiving sets are called for and a much greater volume of transmitting equipment is needed than for the older radio. For the immediate future the backlog of demand accumulated during the war and the increasing popularity of combination radio and phonograph sets offer capacity markets.

Radio and similar equipment: United States imports for consumption, by kind, with principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Receiving sets | $3,873 | UNITED KINGDOM, $1,913; Germany, 1/ $689; Canada, $242. |
| Radio tubes | 2,086 | Netherlands, $1,634; UNITED KINGDOM, $245. |
| Other radio apparatus | 42,338 | Germany, 1/ $19,730; UNITED KINGDOM, $9,677; Canada, $4,982. |
| Other electronic tubes (except X-ray) | 65,126 | Germany, 1/ $42,030; Netherlands, $22,108. |

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

TELEGRAPH APPARATUS, N.E.S., AND PARTS

Stat. import class (1939): 709.67

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | | |
| | Value (dollars) | | | | | |
| 1937 --- | Not | 502,634 | 1,764 | 1,764 | | |
| 1938 --- | | 343,459 | 3,504 | 3,490 | | |
| 1939 --- | avail- | 299,820 | 3,254 | 3,164 | | |
| 1943 --- | able 1/ | 2/ 1,906,604 | 3/ 145,684 | 120,069 | | |

1/ Production was valued at $5,061,000 in 1927, the last year for which it was separately reported.

2/ Includes apparatus valued at $997,845 exported under lend-lease.

3/ Includes imports valued at $131,292 duty-free as an act of international courtesy; also free for Government use, $10,700.

Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 353 | | | |
| Electrical telegraph (including printing and typewriting) apparatus, instruments (other than laboratory) and devices, finished or unfinished, wholly or in chief value of metal --------- | 35 | 1/ 17½ | UNITED KINGDOM |

1/ Trade agreement with the United Kingdom, effective January 1939.

Comment

Telegraph apparatus, formerly very simple, has, with the developemtn of automatic operation and high-speed printing, become complex and varied. The Western Union Telegraph Co. designs its apparatus, buys the components from electrical and other manufacturers, and assembles the instruments. European equipment is similar in principle to that used in the United States, but the traffic is lighter and the apparatus generally simpler.

Exports, which are many times imports, go largely to Canada and Latin America. One large firm which operates foreign cables and lines has a manufacturing subsidiary in the United States.

The Western Union Co. imports very little apparatus. Occasionally some cable instruments are imported to match those on the foreign ends of cables. The unusual increase in imports in 1943 was almost wholly the result of special imports entered as a courtesy to foreign governments in connection with war operations (see also Summary Digest on par. 353).

# TELEPHONE APPARATUS, N.E.S., AND PARTS

Stat. import class (1939): 709.69

United States production, exports, and imports, 1937-39 and 1943

| Year | Production 1/ | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | BELGIUM | Sweden | UNITED KINGDOM |
| | Value (1,000 dollars) | | | | | |
| 1937 --- | 115,883 | 3,282 | 27 | 17 | 2/ | 2 |
| 1938 --- | n.a. | 3,734 | 102 | 21 | 13 | 65 |
| 1939 --- | 94,496 | 3,359 | 51 | 33 | 7 | 5 |
| 1943 --- | n.a. | 3/ 17,394 | 4/ 36 | - | | 20 |

1/ Includes telegraph apparatus. 2/ Less than 500 dollars.
3/ Includes 12,154 thousand dollars exported under lend-lease.
4/ Free for Government use, 10 thousand dollars; duty-free as an act of international courtesy, 17 thousand dollars.
Source: Official statistics of the U. S. Department of Commerce.

| | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 353 | | | |
| Electrical apparatus, instruments (other than laboratory), and devices ---------- | 35 | 35 | BELGIUM<br>UNITED KINGDOM |

## Comment

All kinds of telephone equipment are included in this digest except certain apparatus for general use, such as generators, batteries, wire, cable, and line material, and various components of apparatus when imported separately. Telephone equipment is used by telephone operating companies, railroads, power companies, and for intra-plant or intra-building communication.

In the United States about 80 percent of the public telephone service is operated by the Bell system (American Telephone and Telegraph Co.) The system manufactures most of its own equipment through a subsidiary, the Western Electric Co., which produces about 90 percent of the equipment for all domestic telephone companies. The remainder is made by several "independent" manufacturers. The Western Electric Company buys a substantial part of the output of the independents and also sells equipment to independent telephone companies. One of the independent United States telephone companies, operating also in other parts of North and South America, has a manufacturing subsidiary in the United States, another in Belgium, and until recently one in England.

The Bell system formerly owned telephone systems and manufacturing subsidiaries in many foreign countries, but sold them to the International Telephone and Telegraph Co.. In addition to its foreign business, this company manufactures equipment in the United States for export. Its foreign factories are in Great Britain, France, Belgium, Holland, Australia, Japan, China, and elsewhere. There are also important producers in Germany, Sweden, and other countries.

TELEPHONE APPARATUS, N.E.S., AND PARTS-Continued

Imports into the United States usually consist chiefly of equipment shipped by the International Telephone and Telegraph Co. from its manufacturing subsidiary in Belgium to Puerto Rico, where it operates the telephone system. The Bell system, making its own equipment, presumably would not buy foreign apparatus under any rate of duty. Imports (other than those of International Telephone and Telegraph Co. into Puerto Rico) therefore would, if they developed, compete with the relatively small independent manufacturers for the business of the independent telephone companies and for supplying private users. Servicing, the supply of parts, and differences in design and operation of foreign equipment, which would have to be used in connection with domestic equipment, would handicap a foreign supplier importing on any but a large scale.

# X-RAY, THERAPEUTIC AND DIAGNOSTIC APPARATUS AND PARTS

Stat. import classes (1939): 709.60, 709.70, and 709.71

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption 1/ from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Germany 2/ | NETHERLANDS | Sweden | UNITED KINGDOM |
| | Value (1,000 dollars) | | | | | | |
| 1937 - | 19,272 | 2,022 | 201 | 95 | 90 | 11 | 3/ |
| 1938 - | n.a. | 1,992 | 181 | 74 | 84 | 17 | 3 |
| 1939 - | 18,944 | 2,201 | 85 | 36 | 27 | 17 | 2 |
| 1943 - | n.a. | 4/ 3,628 | 5/ 11 | 3/ | - | - | 2 |

1/ Not strictly comparable from year to year.
2/ Includes Austria beginning 1938.
3/ Less than 500 dollars.
4/ Includes 1,622 thousand dollars exported under lend-lease.
5/ Free for Government use, 9 thousand dollars from Canada.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 353 | | | |
| Therapeutic and diagnostic apparatus, instruments, and devices and parts | 35 | 35 | UNITED KINGDOM |
| X-ray tubes | 35 | 1/ 17½ | UNITED KINGDOM, NETHERLANDS |
| X-ray apparatus, instruments, and devices, and parts | 35 | 1/ 17½ | DO |

1/ Trade agreement with Netherlands, effective February 1936.

## Comment

X-ray apparatus comprises vacuum tubes, in which a refractory metal is bombarded by electrons, the apparatus for supplying and controlling the required electric potentials, and screens and various other auxiliary equipment. X-rays are used for medical and dental diagnosis and therapy, in industry for inspection of materials, food, and fabricated articles, and for routine and research work in chemistry and physics. Examples of other therapeutic and diagnostic apparatus are diathermy apparatus for heating interior regions of the body, and the electrocardiograph, for recording the action of the heart.

The General Electric and Westinghouse companies and an affiliate of a large Dutch electrical firm make both tubes and apparatus in the United States. Tubes are made by several other firms, one of which is perhaps the largest tube maker, and a number of others do not make tubes, but make X-ray apparatus and other electromedical equipment.

X-RAY, THERAPEUTIC AND DIAGNOSTIC APPARATUS AND PARTS-Continued

X-ray tubes and apparatus are made in most of the foreign industrial countries; the Netherlands and Germany are the leaders. The Philips concern, a large Dutch manufacturing firm with world-wide connections, has been the only important supplier of United States imports. There was at one time a preference among many American physicians for Philips apparatus, but this is now of less consequence. Furthermore, several years before the war Philips established a branch in the United States. Up to the outbreak of the war this branch was importing a decreasing number of parts from the Netherlands and manufacturing an increasing proportion of its apparatus.

The United Kingdom has not been a prominent producer of X-ray apparatus and tubes, but its productive capacity doubtless was expanded during the war. United States imports from Great Britain have been very small; exports to that country have been much larger than imports.

X-ray, therapeutic, and diagnostic apparatus and parts: United States imports for consumption, by kind, with principal sources, 1939

| Kind | Total value | Principal sources | Equivalent ad valorem |
|---|---|---|---|
| | | | Percent |
| Therapeutic and diagnostic apparatus | $6,396 | Germany, 1/ $2,131; UNITED KINGDOM, $1,677; Denmark, $846. | 35 |
| X-ray tubes | 16,581 | NETHERLANDS, $11,651; Germany, 1/ $4,853. | 2/ |
| Other X-ray apparatus and parts | 62,248 | Germany, 1/ $28,972; Sweden, $17,229; NETHERLANDS, $15,024. | 2/ |

1/ Includes Austria.
2/ On German products, 35 percent ad valorem; on others, 17½ percent.
Source: Official statistics of the U. S. Department of Commerce.

## PRIMARY CELLS (BATTERIES) FLASHLIGHTS, AND FLASHLIGHT CASES

Stat. import classes (1939): 709.81 and 709.82

United States production, exports, and imports, 1937-39 and 1943

| Year | Production 1/ | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Japan | China | Hong Kong | UNITED KINGDOM |
| | Value (dollars) | | | | | | |
| 1937 | 24,627,000 | 4,660,000 | 51,395 | 44,967 | 1,079 | 3,766 | - |
| 1938 | n.a. | 3,303,000 | 22,085 | 16,189 | 1,095 | 134 | 75 |
| 1939 | 30,095,000 | 4,767,000 | 16,587 | 10,913 | 4,709 | 788 | - |
| 1943 | n.a. | 2/3,411,000 | 3/84,918 | - | - | - | 531 |

1/ Batteries only, no data available on flashlight cases.
2/ Includes $2,234,910 exported under lend-lease.
3/ Free for Government use, imports valued at $83,063 from Canada.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 353 | | | |
| Primary cells (batteries) ------- | 35 | 35 | UNITED KINGDOM |
| Flashlights and cases ---------- | 35 | 35 | do. |

### Comment

The dry cell used for flashlights, portable radios, and many other purposes is the principal type of primary cell. Wet primary batteries are used for signalling and various special purposes. The United States, many European countries, and Japan make dry cells and flashlights in large numbers. They are easily made and are produced in many countries with minor industrial development, although the quality may suffer because of insufficient technical knowledge and attention. For many years United States imports have been negligible in relation to domestic production. There is a large market for flashlight and dry cells in undeveloped countries, where lighting from power lines is not universal. The United States exports few primary cells to Europe, but exports a greater value to British countries than the United Kingdom exports to all countries.

Primary batteries and flashlights: United States imports for consumption, by kind, with principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Primary batteries ------- | $30 | Japan, $10; China, $9; Germany, 1/ $8 |
| Flashlights and cases --- | 16,557 | Japan, $10,803; China, $4,700 |

1/ Includes Austria.
Source: Official statistics of the U. S. Department of Commerce.

ELECTRIC RANGES AND PARTS

Stat. import class (1939): 709.85

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from— | | | |
|---|---|---|---|---|---|---|
| | | | All countries | CANADA | UNITED KINGDOM | |
| | Value (dollars) | | | | | |
| 1937 -- | 26,752,000 | 399,939 | 254 | 124 | - | |
| 1938 -- | n.a. | 350,410 | 1,880 | 1,812 | - | |
| 1939 -- | 19,733,000 | 379,180 | 2,851 | 2,460 | 169 | |
| 1943 -- | n.a. | 78,416 | 1/ 31,366 | 31,365 | - | |

1/ Free for Government use, $31,065.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 353 | | | |
| Electric cooking stoves and ranges, and parts ---------- | 35 | 1/ 17½ | CANADA |

1/ Trade agreement with Canada, effective January 1939; rate previously reduced to 25 percent in first trade agreement with Canada, effective January 1936.

Comment

Electric ranges are made in the United States by 40 or more producers, including the large electrical firms. In Canada about 15 firms make them, including several branches of United States producers. Normal Canadian annual production is under 3 million dollars. The largest imports in any year since the agreement rate became effective (with the exception of some imports for Government use in 1943) amounted to about $6,700, less than one-tenth of 1 percent of the usual value of United States production, and less than 2 percent of United States prewar exports.

ELECTRICAL WIRING DEVICES AND PARTS

Par. No. 353
UNITED KINGDOM

Stat. import classes (1939): 709.31 and 709.98

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports 1/ | Imports for consumption 2/ from--- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Germany 3/ | France | UNITED KINGDOM | Canada |
| | Value (dollars) | | | | | | |
| 1937 | 59,363,761 | 2,232,770 | 22,912 | 20,628 | 19 | 1,549 | 58 |
| 1938 | n.a. | 2,336,122 | 34,527 | 31,737 | 167 | 1,083 | 979 |
| 1939 | 65,319,717 | 2,771,666 | 39,458 | 26,496 | 2,090 | 1,558 | 695 |
| 1943 | n.a. | 4/ 6,002,858 | 5/ 33,604 | - | - | 2,926 | 30,678 |

1/ Includes sockets, outlets, fuse blocks, and lighting switches.
2/ Classified in 1943 as "Sockets, attachment plugs, and switches not over 10 amperes, cutouts and fuses not over 30 amperes, and other wiring devices such as are used in house wiring." Not strictly comparable with the years 1937-39.
3/ Includes Austria beginning 1938.
4/ Includes $410,776 exported under lend-lease.
5/ Includes imports from Canada valued at $26,697, duty-free as an act of international courtesy; and $1,878 free for Government use.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 353 | | | |
| Electrical wiring apparatus and devices: | | | |
| Sockets, attachment plugs, and switches not over 10 amperes, cutouts and fuses not over 30 amperes, and other distribution apparatus, and parts. | 35 | 35 | UNITED KINGDOM |

Comment

Wiring devices include small switches, wall outlets, lamp holders, and other small devices for distributing electricity in buildings. They are made in large numbers by many firms, both large and small, in the United States and in many foreign countries. United States exports, many times imports, go chiefly to countries in the Western Hemisphere. Differences in standard construction and in installation regulations between the United States and Europe tend to restrict imports of wiring devices.

ELECTRICAL GOODS; N.E.S. AND PARTS

Stat. import class (1939): 709.99

United States production, exports, and imports, 1937-39 and 1943 1/

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Germany 2/ | France | UNITED KINGDOM | Japan |
| | Value (1,000 dollars) | | | | | | |
| 1937- | 164,045 | 9,149 | 467 | 141 | 87 | 152 | 20 |
| 1938- | n.a. | 9,932 | 3/ 617 | 136 | 195 | 112 | 22 |
| 1939- | 189,491 | 11,801 | 519 | 294 | 132 | 35 | 22 |
| 1943- | n.a. | 4/22,236 | 5/7,280 | 6/ | - | 437 | - |

1/ Values of production, exports, and imports are only roughly comparable.
2/ Includes Austria beginning 1938.
3/ Includes 119 thousand dollars imported from the Netherlands.
4/ Includes 12,737 thousand dollars exported under lend-lease.
5/ Free for Government use 5,812 thousand dollars of which 5,628 thousand dollars were imported from Canada; also includes imports duty-free as an act of international courtesy, valued at 1,402 thousand dollars, of which 1,102 thousand dollars were imported from Canada.
6/ Less than $500.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 353 Miscellaneous electrical articles | 35 | 1/25 | UNITED KINGDOM |

1/ Trade agreement with the United Kingdom, effective January 1939; the duty reduction did not apply to imports from Germany.

Comment

This import class, usually the largest in value of those covering electrical goods, includes a great variety of miscellaneous articles not covered by any other classification, besides a substantial amount of goods properly classifiable in other electrical groups but for which sufficient descriptions on entries are often lacking. Examples of imports in the class are bicycle-lighting sets, hair-waving machines, light meters, advertising novelties, geological apparatus for locating oil, and miscellaneous component parts, many of them probably for previously imported apparatus. Some of the items are imported fairly consistently; others enter only occasionally. As might be expected from the miscellaneous and changing character of the goods, the principal country of origin varies from year to year.

Definite comparisons between domestic production, imports, and exports are not possible, but it is certain that exports greatly exceed imports for the group as a whole. It is also likely that the transfer to their respective groups of those items hitherto not properly classified would not materially change the conclusions that might be drawn from the data as presented either in this digest or in other digests relating to electrical goods.

The duty was reduced from 35 percent to 25 percent ad valorem by the trade agreement with the United Kingdom effective January 1, 1939. The benefit of this reduction in rate was not extended to Germany, which had been the largest supplier.

Imports from France and the United Kingdom in 1939 were smaller than in 1938. The disturbed conditions in those countries may have prevented an increase in imports. It is noteworthy, however, that imports from Germany were larger in 1939 than in the two preceding years.

Electrical goods and parts, n.e.s.: United States imports for consumption, by kind, with principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Electrical goods and parts, n.e.s. | $513,634 | Germany, 1/ $293,691; France, $132,497; UNITED KINGDOM, $35,155; Netherlands, $11,256. |
| Electrical wiring apparatus, instruments, devices, and other electrical goods and parts, n.e.s. | 14,452 | Japan, $5,814; Germany, 1/ $4,115; France, $1,950; UNITED KINGDOM, $1,247. |

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

MACHINES WITH ELECTRICAL ELEMENTS AND PARTS

Stat. import classes (1939): 7069.0-1; 7100.0-.1; 7106.3-.9; 711.40-59

United States production, exports, and imports, 1937-39 and 1943

| Year | Production 2/ | Domestic exports 2/ | Imports for consumption 1/ from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Germany 3/ | Canada |
| | Value (1,000 dollars) | | | | | |
| 1937 --- | 352,113 | 27,057 | 350 | 60 | 191 | 15 |
| 1938 --- | n.a. | 25,799 | 381 | 182 | 141 | 7 |
| 1939 --- | 290,513 | 24,484 | 254 | 114 | 85 | 22 |
| 1943 --- | n.a. | 4/ 14,897 | 5/ 480 | 148 | 6/ | 306 |

1/ Not strictly comparable for series.
2/ Production and exports shown are those of only certain classes of machines. Values for many other machines cannot be determined.
3/ Includes Austria beginning 1938.
4/ Includes 5,862 thousand dollars exported under lend-lease.
5/ Free for Government use, imports valued at 224 thousand dollars.
6/ Less than $500.
Source: Official statistics of the U. S. Department of Commerce.

The tariff

This digest treats "machines with electrical elements" in contrast to "electrical machinery." The latter refers to machines which are purely electrical, as generators and motors. On the other hand, a machine for woodworking, for example, although it may have an essential electrical element such as a driving motor, is fundamentally a woodworking, not an electrical machine.

To be dutiable under paragraph 353 a machine must have as an essential feature an electrical element or device. Hence it has been held that a machine whose only electrical feature is an electric driving motor, or perhaps a heating element, is dutiable under this paragraph only when it is so designed that the motor or element forms an integral part of the machine. If the motor could easily be replaced by some other form of power, then the machine is dutiable under paragraph 372 as though it contained no electrical element. In most cases the economic and competitive conditions governing importation are influenced only slightly or not at all by the facility with which the motor theoretically could be replaced by some other form of power, or by the presence of the driving motor, the value of which is often only a small part of the cost of the whole machine. Most manufacturing machinery is now electrically driven, and the dutiable classification of many machines depends on these incidental features of construction.

The provision in the United Kingdom trade agreement of 1939 for electrically-equipped machines not otherwise provided for (in the tariff act or in trade agreements) which would be dutiable under paragraph 372 "if of a kind which could be designed to operate without such electrical element or device," was intended to eliminate so far as possible the excess of the duties of paragraph 353 over those of paragraph 372, by providing the same rate (27½ percent) regardless of whether such details as the location and mounting of the motor made them dutiable under paragraph 353 or 372.

Duties on several classes of industrial machines covered by paragraph 372 but not there provided for by name were reduced by various trade agreements to rates below 27½ percent of the act, and in each case reductions to the same rate were made on similar machinery with electrical elements, dutiable under paragraph 353.

MACHINES WITH ELECTRICAL ELEMENTS AND PARTS--Continued

These classes are shown in tabular form below, with the rates on machines with electrical elements (par. 353) and on their nonelectrical counterparts dutiable under paragraph 372. Also shown are several classes of apparatus with electrical elements, treated in this digest, nonelectrical counterparts of which either do not exist or are of insufficient importance to warrant separate mention, such as household vacuum cleaners, and electric locomotives. Calculating machines are treated in a separate digest.

As the duties on fundamentally nonelectrical machines are now the same whether or not they contain electrical elements, it is not likely that meticulous attention is paid to determining details of construction merely for the purpose of allocating imports to the proper statistical classification. Too great dependence should not be placed, therefore on the figures reported.

| Kind | United States tariff | | | |
|---|---|---|---|---|
| | If dutiable under Par. 353 (Act of 1930, 35% on all classes) | | If dutiable under Par. 372 (Act of 1930, 27½% on all classes) | |
| | Class No. | 1945 rate percent | Class No. | 1945 rate percent |
| Par. 353 | | | | |
| Machines with electrical elements: | | | | |
| Machines the duty on which was reduced under par. 353, but not under par. 372: | | | | |
| Machines having as an essential feature an electrical element or device and which could be dutiable under par. 372 of the Tariff Act of 1930 if of a kind which could be designed to operate without such electrical element or device (except articles of a class or kind with respect to which United States import duties have been reduced or bound against increase pursuant to any agreement concluded prior to November 17, 1938 under section 350 of such act, as amended); all the foregoing, not specially provided for, finished or unfinished, wholly or in chief value of metal, and not otherwise provided for in any item numbered 353 in the agreement with the United Kingdom; and parts thereof | 7100.8 | 27½ 1/ | 780.99 | 27½ |
| Machines the duty on which was not reduced under either par. 353 or par. 372: | | | | |
| Internal combustion engines, other than carburetor type, horizontal type, weighing over 5,000 lbs. each | 711.53 | 35 | 711.25 | 27½ |
| Parts of | | | 711.29 | 27½ |
| Other than horizontal type, weighing over 2,500 lbs. each | 711.59 | 35 | 711.35 | 27½ |
| Parts of | | | 711.39 | 27½ |

Continued on following page.

MACHINES WITH ELECTRICAL ELEMENTS AND PARTS--Continued

| Kind | United States tariff | | | |
|---|---|---|---|---|
| | If dutiable under Par. 353 (Act of 1930, 35% on all classes) | | If dutiable under Par. 372 (Act of 1930, 27½% on all classes) | |
| | Class No. | 1945 rate percent | Class No. | 1945 rate percent |
| Par. 353: | | | | |
| Machines with electrical elements: | | | | |
| Machines the duty on which was reduced under par. 372, and on which corresponding reductions were made under par. 353: | | | | |
| Testing machines for determining the strength of materials or articles in tension, compression, torsion, or shear, and parts | 7100.1 | 20 2/ | 780.62 | 20 2/ |
| Cordage machines, and parts | 7100.3 | 20 1/ | 7100.3 | 20 1/ |
| Tobacco cutting machines and industrial cigarette making machines, and parts | 7100.4 | 22½ 1/ | 780.33 | 22½ 1/ |
| Machines for packaging pipe tobacco, and for wrapping cigarette packages, and parts | 7100.5 | 17½ 1/ | 780.41 | 17½ 1/ |
| Machines for wrapping candy; combination candy cutting and wrapping machines, and parts | 7100.6 | 17½ 1/ | 780.42 | 17½ 1/ |
| Internal combustion engines, carburetor type | 711.40 | 17½ 1/ | 711.12 | 17½ 1/ |
| Parts of | | | 711.13 | 17½ 1/ |
| Other than carburetor type, horizontal type, weighing not over 5,000 lbs. each | 711.50 | 17½ 1/ | 711.20 | 17½ 1/ |
| Parts of | | | 711.23 | 17½ 1/ |
| Other than horizontal type, weighing not over 2,500 lbs. each | 711.55 | 17½ 1/ | 711.30 | 17½ 1/ |
| Parts of | | | 711.33 | 17½ 1/ |
| Machines dutiable under par. 353 and having no important counterparts dutiable under par. 372: | | | | |
| Ticket-issuing machines and parts | 7100.0 | 25 1/ | | |
| Washing machines and parts | 7100.7 | 17½ 3/ | | |
| Vacuum cleaners | 7069.0 | 35 4/ | | |
| Parts | 7069.1 | 35 4/ | | |
| Other, and parts, such as locomotives, portable tools, refrigerators, and signs | 7100.9 | 25 1/ | | |

1/ Trade agreement with the United Kingdom, effective January 1939.
2/ Trade agreement with Switzerland, effective February 1936.
3/ Trade agreement with Canada, effective January 1939.
4/ Bound in trade agreement with Sweden, effective August 1935.

MACHINES WITH ELECTRICAL ELEMENTS AND PARTS--Continued

Comment

The machines listed above which are dutiable also under paragraph 372 are primarily nonelectrical machines, and are discussed in digests relating to that paragraph. No comment is made here on such machines. Six other classes are listed which are distinctly electrical, having no counterparts dutiable under paragraph 372. They are discussed in the following paragraphs.

Ticket-issuing machines, much used by motion picture theatres, were imported by an American branch owned by a British manufacturer. Later this firm imported parts for assembly, and now has a factory in the United States. Imports are now much smaller and unlikely to increase.

Household electric washing machines and vacuum cleaners are made by mass-production methods by a number of moderate and large-sized companies in the United States. It is understood that one Canadian manufacturer requested the reduction in the United States duty on washing machines, but scarcely any machines have entered since the reduction was made in 1939.

A patented vacuum cleaner, "Electrolux," made by a Swedish firm, in Sweden and in several other European countries, was imported until 1932. Imports the preceding year were over $700,000 in value. A corporation organized in the United States then acquired the United States patents, and the cleaner has been made in the United States since. For some years after 1932 there was a small flow of repair parts and a few cleaners from Sweden. A few machines have also been supplied from the Netherlands and Germany.

Some calculating machines of a type developed in Sweden have been imported. These are discussed in digests relating to paragraph 372; imports are negligible and are not included in the total imports shown in this digest.

In the class of "other" machines with electrical elements there is a wide variety. From time to time particular machines are developed in foreign countries which fill a need, often in a narrow field. Such a machine may differ from the domestic only in some detail. If the demand is insufficient to warrant manufacture in the United States, the machine is imported, perhaps only until it is superseded by a domestic model. But if a large market develops, it is likely that either an American manufacturer will obtain a license to make the machine in the United States or that the foreign producer will establish a factory in the United States for the purpose, perhaps at first importing the parts for assembly. In either event, imports will fall off or disappear.

Imports under this classification generally consist of a changing conglomeration of machinery, with an additional flow of unrelated devices, some of which may be imported only once. In general the United States leads the world in volume of production of machines with electrical elements, and in quality at least equals the best. Imports of the group are equivalent to a very small fraction of domestic production and exports far exceed imports.

MACHINES WITH ELECTRICAL ELEMENTS AND PARTS--Continued

Machines with electrical elements: United States imports for consumption, by kind, with principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Vacuum cleaners | $20,092 | Netherlands, $12,392; Germany, 1/ $5,249; UNITED KINGDOM, $1,889 |
| Parts | 2,363 | Germany, 1/ $1,439; Canada, $706; Sweden, $410 |
| Ticket-issuing | 12,987 | UNITED KINGDOM, $12,987 |
| Testing | 8,083 | UNITED KINGDOM, $6,307; Germany, 1/ $1,264 |
| Cordage | - | |
| Tobacco cutting and wrapping | 182 | UNITED KINGDOM, $182 |
| Tobacco packaging | - | |
| Candy wrapping | 5,212 | Germany, 1/ $3,112; UNITED KINGDOM, $2,100 |
| Washing machines | 489 | UNITED KINGDOM, $186; Canada, $149; Germany, 1/ $129 |
| Machines resembling machines in par. 372 | 43,685 | Germany, 1/ $17,948; Canada, $14,910; UNITED KINGDOM, $8,849 |
| Internal combustion engines | 272 | UNITED KINGDOM, $206 |
| Other: | | |
| Locomotives, refrigerators, etc. | 159,792 | UNITED KINGDOM, $81,551; Germany, 1/ $55,379; Sweden, $6,985; Canada, $5,661 |

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

ELECTRICAL CALCULATING MACHINES AND PARTS
(See digest on Hand Calculating Machines, par. 372)

Stat. import class (1939): 7786.6

United States production, exports, and imports, 1937-39 and 1943

| Year | Production 1/ | Domestic exports 1/ | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | Sweden | UNITED KINGDOM | Germany 2/ |
| | Value (1,000 dollars) | | | | | |
| 1937 | 13,506 | 2,482 | 30 | 8 | - | 21 |
| 1938 | n.a. | 1,754 | 41 | 20 | 1 | 16 |
| 1939 | 8,608 | 1,603 | 37 | 30 | 7 | 3/ |
| 1943 | n.a. | 4/1,079 | 5/3/ | - | - | - |

1/ Includes all calculating machines.
2/ Includes Austria beginning 1938.
3/ Less than $500 dollars.
4/ Includes calculating machines valued at 671 thousand dollars exported under lend-lease. 5/ All From Canada.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 353 | | | |
| Electrical calculating machines, specially constructed for multiplying and dividing, and parts -- | 35 | 1/ 25 | UNITED KINGDOM |

1/ Trade agreement with Sweden, effective August 1935.

Comment

Calculating machines usually have a keyboard with about 90 keys. A machine developed in Sweden with only 10 keys has been imported to some extent, but the former importer is now making the machines in the United States under license. United States imports have consisted partly of these machines and partly of German machines of certain types. United States exports usually exceed imports by 50 times, and exports to Sweden exceeded imports from that country even when the Swedish machines referred to were being imported. The United Kingdom, the largest foreign market for American calculators, buys many times the amount of its exports to the United States.

Par. No. 354-5, 357-8
UNITED KINGDOM
FRANCE

## CUTLERY a/—(Summary Digest)

Stat. import classes (1939): 6117.0-.6; 6118.0-613.90 (57 classes)

United States production, exports, and imports, 1937-39 and 1943

| Year | Production 1/ | Domestic exports 2/ | Imports for consumption from— | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Germany 3/ | UNITED KINGDOM | Denmark | FRANCE |
| | Value (1,000 dollars) | | | | | | |
| 1937 - | 73,764 | 1,717 | 730 | 392 | 169 | 66 | 36 |
| 1938 - | n.a. | 4/ 1,323 | 478 | 237 | 115 | 61 | 32 |
| 1939 - | 79,231 | 1,826 | 497 | 180 | 150 | 71 | 48 |
| 1943 - | n.a. | 5/ 3,569 | 6/259 | 7/ | 29 | - | 7/ |

1/ Includes spoonware which is not separated in production statistics, and estimates for certain items totaling $1,500,000 annually. Spoons are not included in export and import data and to this extent production, export , and import data are not strictly comparable.

2/ Partly estimated.

3/ Includes Austria beginning 1938.

4/ Does not include sterling, silver-plated, and other solid silverware, knives, forks, and steak sets, not separately reported.

5/ Includes 226 thousand dollars exported under lend-lease.

6/ Free for Government use, 48 thousand dollars imported from Canada; also includes 119 thousand dollars imported duty-free as an act of international courtesy from Canada.

7/ Less than $500.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Par. | Item | United States tariff, 1939 1/ - Range within group | Proposed negotiating country |
|---|---|---|---|
| 354 | Knives with folding blades | 1¼¢ ea. + 50% ad val. to 35¢ ea. + 55% ad val. | UNITED KINGDOM |
| 354 | Cuticle and corn knives, nail files, tweezers, manicure and pedicure nippers, and parts | 60% ad val. | FRANCE |
| 355 | Fixed blade cutlery | 2¢ ea.+ 25% ad val. to 16¢ ea.+ 45% ad val. | UNITED KINGDOM |
| 357 | Scissors and shears (other than pruning and sheep shears) | 3½¢, 15¢, or 20¢ ea. + 45% ad val. | do. |
| 357 | Pruning and sheep shears | 10¢ ea. + 22½% ad val. to 3½¢ ea. + 45% ad val. | do. |
| 357 | Nail, barbers', and animal clippers | 3½¢, 15¢, or 20¢ ea. + 45% ad val. | do. |
| 358 | Safety razors | 5¢ ea. + 15% ad val. | do. |
| 358 | Safety razor blades (includes blades in strip) | ½¢ ea. + 15% ad val. | do. |
| 358 | Razors (other than safety razors and electric shavers) | 18¢ 25¢, 30¢, 35¢, or 45¢ ea. + 30% ad val. | do. |

1/ A number of reductions were made in 1930 Tariff Act rates, but none subsequent to January 1939.

Note.- See table below for ad valorem equivalents of rates of duty.

a/ Includes pocket, table, butchers', and related cutlery, razors, scissors, and shears, manicure tools, and clippers. Machine knives (Par. 356) and scythes, sickles, etc. (par. 373) are not included herein.

Fixed blade cutlery, safety razors and blades, scissors and shears, and pocket knives are the most important subgroups in United States production and consumption. Imports are also greatest in these subgroups in each of which they supply only a small part of domestic consumption. In some other subgroups, relatively small in value, imports bear a comparatively high ratio to domestic production. In exports, safety razors and blades are by far the leading items, followed by fixed blade cutlery, scissors, and shears. Production, exports, imports, and the ad valorem equivalents of the rates of duty in 1939 are shown below.

Cutlery: Summary of United States production, exports, imports, and ad valorem equivalents of rates of duty, by groups of products, 1939

| Subgroup | Production | Domestic exports | Imports | Ad valorem equivalent of rates of duty 1/ |
|---|---|---|---|---|
| | 1,000 dollars | 1,000 dollars | 1,000 dollars | Percent |
| Fixed blade cutlery | 2/45,353 | 396 | 226 | 36 to 69 |
| Scissors and shears, n.e.s. | 5,290 | 3/(154) | 48 | 84 to 199 |
| Pruning and sheep shears | 1,390 | 3/(154) | 25 | 37 to 204 |
| Knives with folding blades | 5,180 | 4/50 | 29 | 40 to 220 |
| Nail, barbers' and animal clippers | 1,202 | 4/50 | 1 | 118 to 154 |
| Safety razors and blades | 19,220 | 1,125 | 64 | 20 to 123 |
| Other razors (except electric shavers) and parts | 95 | 5/ | 59 | 96 to 152 |
| Cuticle and corn knives, tweezers, etc. | 1,500 | 50 | 46 | 60 |

1/ The ranges here given are based on average duties paid on actual imports in the different subgroups. Where the rates are divided into value brackets, the maximum ranges are much greater than here shown. 2/ Includes spoons, which are not separated from knives and forks (cutlery) in production statistics. 3/ Scissors, shears, and snips of all kinds. 4/ Estimated. 5/ Not available.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

The domestic industry is composed of about 145 firms, employing 12,000 workers. Cutlery is produced in 17 States, but mainly in New England, New York, and New Jersey. Northeastern States account for about 90 percent of the total output. Most of the output is produced in or near metropolitan centers, but production in small towns is also substantial and for several such towns cutlery constitutes the most important local industry.

All of the cutlery products specified in the tariff act are made in the United States. Some of them either originated in the United States or were developed from foreign models for American use. Typical examples are safety razors and blades, electric clippers, and sterling and silver-plated tableware in matched sets. A few special grades of products, such as highly ornamented pocket knives, safety razors with hollow ground blades, and shears with handles inlaid with enamel, are either not made in the United States or are produced in only negligible quantities. Many of these products, such as safety razor blades and silver-plated table knives and forks, are produced in volume by mass-production methods for the United States market; others, such as highly ornamented shears and hollow ground razor blades, are not in sufficient demand or are not of a nature to warrant the use of mass-production methods. Most concerns manufacture products included in only one

or two of the subgroups, but a few make products included in several groups. Some concerns also make products other than cutlery, for example, manufacturers of sterling and silver-plated cutlery make hollow ware, and manufacturers of electric clippers make other electrical products.

Imports have included practically all varieties of cutlery, although some have been imported to a very limited extent. They have ranged in character from luxury goods of unusually fine workmanship to low-priced articles sold to chain stores. Fixed blade cutlery was the principal item imported in 1939, especially table cutlery with silver handles ($74,586) and kitchen, butchers', and similar cutlery with handles of wood or wood and steel ($62,857). Safety razors and blades were second in importance, mainly because of imports of a leading foreign make with hollow ground blades. Straight razors ranked third in importance. Imports, mainly because of the preference of professional barbers for certain foreign makes, supplied about 62 percent of domestic requirements in 1939. Scissors and shears valued over $1.75 per dozen constituted the next most important group. This class included relatively high-priced decorated shears. Next in importance were cuticle and corn knives, tweezers, etc., which included specialties not made to any great extent in the United States. Knives with folding blades were of some importance in imports mainly because of importations of ornamented knives valued over $6 per dozen, and pruning and sheep shears because of their prestige value with certain domestic consumers.

In prewar years Germany was the leading or an important source of imports of most of the articles included herein. The United Kingdom ranked next as a supplier of similar goods of characteristically good quality. In 1939 Germany was the leading source of imports of straight razors, scissors, shears, and knives with folding blades, while the United Kingdom was the leading source of safety razors and blades and pruning and sheep shears, and an important secondary source of imports of fixed blade cutlery, including popular sterling-silver designs. France, a supplier of relatively small shipments of most items, was the leading foreign supplier of cuticle and corn knives, tweezers and other manicure implements, and of nail, animal, and barbers' clippers, and an important supplier of chef knives. Denmark, with unique designs in sterling-silver table cutlery, was the leading supplier of imports of fixed blade cutlery. Sweden supplied small quantities of high-grade kitchen, table, and pocket knives, while Japan, the only non-European supplier of any importance, supplied low-priced articles in many classes.

Generally speaking, the United States cutlery industry is in a favorable position with respect to international competition. Production is large and exports exceed imports. But the competitive situation differs with individual items. In the case of low- and medium-priced goods in large demand in this country, the United States has ample supply of essential raw materials, manufacturing experience and equipment, and efficient distribution methods. Certain types of higher-priced wares and specialties of particular countries have been imported in small volume despite the high duties.

During the interwar period there was a substantial growth in the American industry because of four factors: (1) Diminution of imports; (2) use of war-created facilities for peacetime production; (3) a marked increase in mechanization; and (4) the introduction of stainless steel and iron which was widely adopted as a trade material, especially for kitchen and table cutlery.

Under the Tariff Act of 1913 there was a flourishing trade in imported cutlery except for the interruption of World War I. The Tariff Act of 1922 imposed rates of duty on cutlery (except safety razors and some items of fixed blade cutlery) which were among the highest in the metals schedule, and aggregate import trade dwindled to very small proportions. Most of the rates originally imposed in the act of 1922 are still in force.

CUTLERY-Continued

The rates on fixed blade cutlery were reduced under the trade agreement with the United Kingdom, effective January 1, 1939. Most other rates on cutlery have not been reduced and are among the highest provided in the tariff. Most of the rates are compound. For several classes of articles three or more value brackets have been established, and the specific part of the compound duties makes the ad valorem equivalent of the total charge on the lower-priced articles of each value bracket extremely high; in general, moreover, the rates on the lower value bracket are higher than those on the upper brackets.

## KNIVES WITH FOLDING BLADES

Stat. import classes (1939); 612.00-24 (15 classes)

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Germany 1/ | UNITED KINGDOM | France | Japan |
| | Quantity (number) | | | | | | |
| 1937 | Not available | Not available | 769,567 | 95,801 | 26,441 | 6,103 | 634,986 |
| 1938 | | | 426,557 | 85,459 | 15,193 | 6,113 | 315,742 |
| 1939 | | | 184,161 | 34,131 | 16,364 | 4,984 | 121,980 |
| 1943 | | | 3/ 33,328 | 1 | 7 | - | - |
| | Value (dollars) | | | | | | |
| 1937 | 5,211,022 | Not available 2/ | 55,082 | 26,823 | 12,071 | 1,783 | 12,267 |
| 1938 | n.a. | | 34,026 | 15,542 | 9,077 | 2,208 | 6,157 |
| 1939 | 5,180,060 | | 29,083 | 14,717 | 8,487 | 2,869 | 2,144 |
| 1943 | n.a. | | 3/ 9,044 | 3 | 10 | - | - |

1/ Includes Austria beginning 1938.
2/ Probably valued at $50,000 or thereabouts annually.
3/ Free for Government use, 30,240 knives valued at $6,199 from Canada.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 354 | | | |
| Pen, pocket, clasp, pruning, budding, eraser, manicure, and other knives with folding blades: | | | |
| Valued not over 40¢ per dozen | 1-1/4¢ ea. + 50% ad val. | 1-1/4¢ ea. + 50% ad val. | UNITED KINGDOM |
| Valued over 40¢, not over 50¢ per dozen | 5¢ ea. + 50% ad val. | 5¢ ea. + 50% ad val. | do |
| Valued over 50¢, not over $1.25 per dozen | 11¢ ea. + 55% ad val. | 11¢ ea. + 55% ad val. | do |
| Valued over $1.25, not over $3 per dozen | 18¢ ea. + 55% ad val. | 18¢ ea. + 55% ad val. | do |
| Valued over $3, not over $6 per doz. | 25¢ ea. + 50% ad val. | 25¢ ea. + 50% ad val. | do |
| Valued over $6 per dozen: | | | |
| Pen and pocket knives with folding blades and steel handles, ornamented or decorated with etchings or/and gilded designs | 35¢ ea. + 55% ad val. | 17½¢ ea. + 27½% ad val. 1/ | do |
| Other | 35¢ ea. + 55% ad val. | 35¢ ea. + 55% ad val. | do |
| Assembled but not fully finished: | | | |
| Valued not over $1.25 per doz. | 15¢ ea. + 55% ad val. | 15¢ ea. + 55% ad val. | do |
| Valued over $1.25, not over $3 per doz. | 18¢ ea. + 55% ad val. | 18¢ ea. + 55% ad val. | do |
| Valued over $3, not over $6 per doz. | 25¢ ea. + 50% ad val. | 25¢ ea. + 50% ad val. | do |
| Valued over $6 per dozen | 35¢ ea. + 55% ad val. | 35¢ ea. + 55% ad val. | do |

KNIVES WITH FOLDING BLADES-Continued

| | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 354 | | | |
| Pen, pocket, clasp, pruning, budding, eraser, manicure, and other knives with folding blades-Continued: | | | |
| Blades, handles, or other parts: | | | |
| Valued not over $1.25 per dozen ---- | 11¢ ea. + 55% ad val. | 11¢ ea. + 55% ad val. | UNITED KINGDOM |
| Valued over $1.25, not over $3 per dozen ---------- | 18¢ ea. + 55% ad val. | 18¢ ea. + 55% ad val. | do |
| Valued over $3, not over $6 per dozen---------- | 25¢ ea. + 50% ad val. | 25¢ ea. + 50% ad val. | do |
| Valued over $6 per dozen ---------- | 35¢ ea. + 55% ad val. | 35¢ ea. + 55% ad val. | do |

1/ Trade agreement with Sweden, effective August 1935.
Note.- See table below for ad valorem equivalents of rates of duty.

Comment

Ordinary pen and pocketknives are the principal products included in the broad description of knives with folding blades. Other products are pruning and budding knives, clasp knives, cattle knives, electricians' knives, ink erasers, and manicure knives.

Folding knives vary in number and type of blades and in the articles such as files, scissors, corkscrews, can openers, and leather punches which are sometimes embodied in their construction. The many possible combinations of parts and the varied uses which they serve have led to a large number of patterns and have accounted for the wide variations in retail prices. Folding knives vary in price from those made of inexpensive material and retailing for 10¢ each to high quality knives selling for $3.50 or more each.

Materials used in the construction of folding knives include wood, bone, celluloid, and a number of other materails for handles; brass, steel, or nickel silver for linings; steel or mickel silver for bolsters, and carbon steel or stainless steel for blades. Practically all raw materials are of domestic origin; exceptions are mother-of-pearl, tropical woods, and stag horn. Swedish steel for blades was formerly imported to a limited extent.

From a manufacturing standpoint, folding knives fall into two distinct classes, namely knives with forged blades and knives with blanked blades. The former are hot forged under a machine hammer, ground and polished, and the parts assembled and carefully fitted by experienced cutters. Knives with blades blanked and shaped in the cold state from rolled strip steel and ground and polished on automatic machines are assembled by mechanical processes, and are fitted with a minimum of expert cutlering. Such production is low cost, but the products lack the finish and quality of those with forged blades. Folding knives are made in the United States in all grades, but those in the low-and medium-price grades predominate, the trend in production in recent years having been toward greater use of mechanical equipment and blanked blades.

About 20 firms produce folding knives in the United States, including some who confine their output chiefly to these products, and others who produce folding knives along with a general line of cutlery or in conjunction with other types of products. Production is centered in Connecticut, Rhode Island, and New York. Most of the plants are located in large manufacturing centers, but several are in small towns and constitute practically the only industry in their comunities.

KNIVES WITH FOLDING BLADES-Continued

United States consumption has been affected by changes in personal habits, such as the widespread use of pencil sharpeners, mechanical pencils, and pocket manicure tools. Other factors of importance have been the increasing ratio of clerical to manual workers, the changing activities of the youth of the country, and the small replacement demand for the more expensive knives and those used by electricians, herdsmen, agriculturists, and gardeners.

Germany and the United Kingdom have been the leading sources of imports, but a number of countries, including France, Sweden, Switzerland, Canada, Czechoslovakia, and Japan have participated in the trade. A certain prestige value has been attached to knives imported from the Solingen district in Germany and the Sheffield district in England. In prewar years German imported products consisted of all classes and grades. While the United Kingdom produces all types, the bulk of imports from that country have consisted of good-grade forged-blade knives. Knives from Sweden have predominated the higher-priced value brackets and have included highly ornamented types. Knives from Japan have been chiefly of low-grade suitable only for the chain store trade.

During the war most of the domestic (as well as foreign) producers of folding knives were engaged in the production of war goods. Imports into the United States from the normal leading suppliers were greatly curtailed or nil. In 1943 Canada and Switzerland, formerly relatively unimportant in import trade, were the chief suppliers of imports.

The extent of prewar competition in the United States market between domestic and imported folding knives differed widely between the various grades or value groups defined by the tariff act. Generally speaking, the competitive position of the United States was fairly strong in knives with blanked blades selling in the low-and medium-price brackets. In the highest class, for which the demand in the United States is limited, foreign goods with a certain prestige attached to the quality of their workmanship and design, had some advantage, even over the duty.

The United States demand for the lowest prices knives, that is, those having a foreign value of not more than 40¢ per dozen and a retail value of 10¢ each, was for many years supplied entirely by imports. Germany and Japan were the chief suppliers. With development of blanked blade production and the manufacture of this class of knife by domestic producers, imports declined. In recent prewar years the demand in the United States for knives in the second and third value brackets, that is, those having foreign values between 40¢ and $1.25 per dozen, was also supplied largely by United States producers of blanked blade knives. Japan, Germany, Italy, and Czechoslovakia were sources of imports. In the next class, those having a foreign value of more than $1.25 and not over $3 per dozen and a retail selling price of 50¢ to $1.25 each, the United States supplied most of the demand. Germany, the United Kingdom, and France were sources of imports. in this class in prewar years; in 1943 Canada supplied the imports. In the next highest value bracket, knives having a foreign value of $3 and not over $6 per dozen and a retail selling price at $1.25 to $2.50 each, the United States market was supplied by domestic and imported knives, including forged-blade knives of high quality. Germany, the United Kingdom, Sweden, France, and Switzerland participated in this trade. In the highest value bracket, knives having a foreign value exceeding $6 per dozen and selling at retail for more than $2.50 each, foreign competition in the United States was confined largely to those which retail at $2.50 to $3.50 each. There is only a limited market for the more expensive knives of fancy and combination-tool patterns, and the domestic demand tends towards prestige foreign goods. Germany, the United Kingdom, Sweden, and France were sources of imports in prewar years; in 1943 Switzerland was the chief source. Imports of knives assembled but not fully finished, and of blades, handles, and other parts, are negligible.

KNIVES WITH FOLDING BLADES-Continued

Pen, pocket, clasp, pruning and other knives with folding blades, including assemblies, blades, handles and parts: United States imports for consumption, by kinds, by principal sources with ad valorem equivalent of the duty, 1939

| Item | Total value | Ad valorem equivalent | Principal sources |
|---|---|---|---|
| | | Percent | |
| Pen, pocket, clasp, pruning, budding, erasure, manicure and other knives with folding blades: | | | |
| Valued not over 40¢ per doz. | $2,271 | 120 | Japan $2,114; Hungary $138; Germany 1/ $19 |
| Valued over 40¢ not over 50¢ per dozen | - | - | |
| Valued over 50¢ not over $1.25 per dozen | 104 | 220 | France $47; Italy $26; UNITED KINGDOM $14 |
| Valued over $1.25 not over $3 per dozen | 1,902 | 140 | Germany 1/ $1,383; France $293; UNITED KINGDOM $142 |
| Valued over $3 not over $6 per dozen | 10,136 | 120 | Germany 1/ $6,571; UNITED KINGDOM $3,114 |
| Valued over $6 per dozen n.e.s. | 13,996 | 99 | Germany 1/ $6,736; UNITED KINGDOM $5,118 |
| Pen and pocket knives with folding blades and steel handles, ornamented or decorated with etchings or gilded designs, valued over $6 per dozen | 393 | 40 | France $220; Sweden $164; UNITED KINGDOM $9 |
| Assembled, but not fully finished: | | | |
| Valued not over $1.25 per dozen | - | - | |
| Valued over $1.25 not over $3 per dozen | 63 | 141 | France, $63 |
| Valued over $3 not over $6 per dozen | - | - | |
| Valued over $6 per dozen | 197 | 81 | France $107; UNITED KINGDOM $90 |
| Blades, handles, or other parts: | | | |
| Valued not over $1.25 per dozen | 21 | 160 | Japan $21 |
| Valued over $1.25 not over $3 per dozen | - | - | |
| Valued over $3 not over $6 per dozen | - | - | |
| Valued over $6 per dozen | - | - | |

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

KNIVES WITH FOLDING BLADES-Continued

Imports of knives assembled but not fully finished and of parts of knives have been trivial and sporadic because the duties are relatively even higher than on the finished articles. The unfinished article if valued over $1.25 per dozen, and parts if valued over 50¢ a dozen, would pay the same amount of duty as the finished and whole knife; and below the limits stated the duties on the parts and on the unfinished assemblies are greater than if the articles were finished wholes,--for example, knives valued at 50¢ per dozen are dutiable at 60¢ a dozen plus 50% ad valorem (equivalent to 170% ad valorem) but blades valued at 50¢ per dozen are dutiable at $1.32 per dozen plus 55% ad valorem (equivalent to 319% ad valorem), and some other parts valued at 20¢ a dozen would be charged a duty equivalent to 715% ad valorem.

# CUTICLE AND CORN KNIVES, NAIL FILES, TWEEZERS, MANICURE AND PEDICURE NIPPERS, AND PARTS

Stat. import class (1939): 613.90

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | FRANCE | Germany 1/ | Switzerland |
| | Quantity (number) | | | | | |
| 1937 | Not available | Not available | 327,532 | 15,503 | 243,168 | 33,649 |
| 1938 | | | 496,987 | 29,169 | 405,218 | 22,057 |
| 1939 | | | 177,116 | 70,833 | 53,497 | 19,340 |
| 1943 | | | 2/ 18,719 | - | - | 8,775 |
| | Value (dollars) | | | | | |
| 1937 | 3/ | Not available 4/ | 105,145 | 4,073 | 89,730 | 6,982 |
| 1938 | 3/ | | 60,256 | 9,053 | 45,363 | 5,726 |
| 1939 | 3/ | | 48,614 | 21,015 | 17,645 | 3,433 |
| 1943 | n.a. | | 2/ 5,244 | - | - | 3,796 |

1/ Includes Austria beginning 1938.
2/ United Kingdom and Canada were the other principal sources.
3/ Estimated at about $1,500,000 annually.
4/ Probably valued at about $50,000 annually.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 354 | | | |
| Cuticle knives, corn knives, nail files, tweezers, manicure or pedicure nippers, and parts, finished or unfinished | 60 | 60 | FRANCE |

Note.- A proviso requires that the rate of duty on any of the foregoing, if assembled, but not fully finished, shall be not less than the rate of duty on similar fully finished articles, and not less in any case than 15 cents each plus 55 percent ad valorem. This proviso makes the duty on the assembled but unfinished article higher than on the finished article if the valuation is under $3.00 each (e.g. at $1.00 the duty is equivalent to 70 percent ad valorem); but if the valuation exceeds $3.00, the duty is somewhat lower (e.g. at $6.00 the duty is equal to 57½ percent ad valorem).

## Comment

The United States produces the bulk of its requirements of nail files and tweezers, the major items discussed herein, but imports a substantial proportion of its requirements of manicure and pedicure nippers. Cuticle and corn knives are of limited importance in production and consumption.

The production of nail files is largely a machine operation. Nail files are one of the products of the file-making industry which is highly developed in the United States. Tweezers are stamped metal products made on standard presses. Cuticle and corn knives and manicure and pedicure nippers are professional items with more exacting quality requirements.

CUTICLE AND CORN KNIVES, NAIL FILES, TWEEZERS,
MANICURE AND PEDICURE NIPPERS, AND PARTS-Continued

Nail files and tweezers, because of their use in beauty parlors, barber shops, and homes, are in rather steady demand. Manicure and pedicure nippers and cuticle and corn knives are used largely by chiropodists and beauty and barber shop operators. The demand is limited and replacements are infrequent.

The domestic industry is composed of about 10 companies located in New Jersey, Ohio, and New England. Three firms account for the bulk of the business. Most manicure products are produced by firms who confine their output to manicure tools; the remainder is by companies who fabricate other cutlery and metal ware.

Imports have consisted largely of specialties, including manicure and pedicure nippers, which have not been produced to any extent in the United States. France, Germany, and Switzerland have been the leading sources of imports. Other suppliers include the United Kingdom, Sweden, and Japan.

Some imports, such as tweezers and files, are quality products competitive with domestic goods.

FIXED BLADE CUTLERY (INCLUDES HUNTING, CURRIERS', FARRIERS', HAY, TANNERS', PAINTERS', SHOE, BEET-TOPPING, AND SIMILAR KNIVES, AND TABLE KITCHEN, BUTCHERS', AND SIMILAR CUTLERY, CLEAVERS, FORKS, AND STEELS; HAY FORKS AND 4-TINED MANURE FORKS ARE NOT INCLUDED HEREIN)

Stat. import classes (1939): 613.60-78; 613.80-83; 613.87-88 (25 classes)

United States production, exports, and imports, 1937-39 and 1943

| Year | Production 1/ | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | Denmark | UNITED KINGDOM | Germany 2/ |
| | Quantity (number) | | | | | |
| 1937 | Not | Not | 726,533 | 31,562 | 199,452 | 227,991 |
| 1938 | avail- | avail- | 503,850 | 30,118 | 171,033 | 170,606 |
| 1939 | | | 561,778 | 38,135 | 158,240 | 122,864 |
| 1943 | able | able | 3/ 238,708 | - | 7,096 | 891 |
| | Value (dollars) | | | | | |
| 1937 | 40,658,230 | 416,220 | 286,185 | 66,367 | 67,384 | 92,660 |
| 1938 | n.a. | n.a. | 207,149 | 60,742 | 52,991 | 63,343 |
| 1939 | 45,353,207 | 396,455 | 225,767 | 70,525 | 52,100 | 47,668 |
| 1943 | n.a. | 572,390 | 3/ 99,504 | - | 10,509 | 354 |

1/ Includes spoons; production data are therefore not strictly comparable with export and import statistics shown.

2/ Includes Austria beginning 1938.

3/ Free for Government use, 203,163 valued at $41,673 from Canada; also includes dutiable imports amounting to 26,225 valued at $45,993 from Mexico.

Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 355 | | | |
| Table, butchers', carving, cooks', hunting, kitchen, bread, cake, pie, slicing, cigar, butter, vegetable, fruit, cheese, canning, fish, carpenters' bench, curriers', drawing, farriers', fleshing, hay, sugar-beet, beet-topping, tanners', plumbers, painters', palette, artists', shoe, and similar knives, forks, and steels, and cleavers, *** finished or unfinished, not specially provided for: | | | |
| With handles of mother-of-pearl, shell, ivory, deer, or other animal horn | 16¢ ea.+ 45% ad val. | 8¢ ea. + 25% ad val. 1/ | UNITED KINGDOM |
| With handles plated with and in chief value of silver | 16¢ ea. + 45% ad val. | 10¢ ea. + 25% ad val. 1/ | do. |

FIXED BLADE CUTLERY--Continued

| | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 355 | | | |
| Table, butchers', carving, * * * not specially provided for: Cont'd. | | | |
| With handles of silver (other than plated with silver), or other metal than aluminum, nickel silver, iron or steel -------- | 16¢ ea. + 45% ad val. | 16¢ ea. + 35% ad val. 1/ | UNITED KINGDOM |
| With handles of hard rubber, solid bone, celluloid, or any pyroxylin, casein, or similar material: | | | |
| Table, carving, cake, pie, butter, fruit, cheese, and fish-- | 8¢ ea. + 45% ad val. | 4¢ ea. + 25% ad val. 1/ | do. |
| Other ---------- | 8¢ ea. + 45% ad val. | 8¢ ea. + 35% ad val. 1/ | do. |
| With handles of wood or wood and steel, and specially designed for other than household, kitchen, or butchers' use, or with handles of nickel silver or steel other than austenitic: | | | |
| Less than 4" in length, exclusive of handle --------- | 2¢ ea. + 45% ad val. | 2¢ ea. + 25% ad val. 1/ | do. |
| 4" in length or over, exclusive of handle (except hay forks and 4-tined manure forks) ----- | 8¢ ea. + 45% ad val. | 4¢ ea. + 25% ad val. 1/ | do. |
| With handles of any other material, including those with handles of wood or wood and steel, not specially designed for other than household, kitchen, or butchers' use: | | | |
| Less than 4" in length, exclusive of handle --------- | 2¢ ea. + 45% ad val. | 2¢ ea. + 35% ad val. 1/ | do. |
| 4" in length or over, exclusive of handle (except hay forks and 4-tined manure forks) ----- | 8¢ ea. + 45% ad val. | 8¢ ea. + 35% ad val. 1/ | do. |

FIXED BLADE CUTLERY--Continued

| | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 355 | | | |
| Table, butchers', carving, * * * not specially provided for: Cont'd. | | | |
| Any of the foregoing without handles: | | | |
| With blades less than 6" in length | 2¢ ea. + 45% ad val. | 2¢ ea. + 25% ad val. 1/ | UNITED KINGDOM |
| With blades 6" or more in length (except hay forks and 4-tined manure forks) | 8¢ ea. + 45% ad val. | 4¢ ea. + 25% ad val. 1/ | do. |

1/ Trade agreement with the United Kingdom, effective January 1939.
Note.- See table below for ad valorem equivalents of rates of duty.

Fixed blade cutlery: United States imports for consumption, by kind, rates of duty, and ad valorem equivalents of rates of duty, 1939

| Item | Imports | | Rate of duty | | Ad valorem equivalent of rate of duty |
|---|---|---|---|---|---|
| | Quantity | Value | Specific | Ad val. | |
| | Number | | Each | Percent | Percent |
| Hunting, curriers', farriers', hay, tanners', painters', shoe, beet-topping, and similar knives: | | | | | |
| With handles: | | | | | |
| Mother-of-pearl, shell, ivory, and horn | 355 | $296 | 8¢ | + 25 | 49 |
| Plated with and in chief value of silver | 1,244 | 346 | 10¢ | + 25 | 61 |
| Silver (except silver-plated) or metal other than iron or steel, aluminum, and nickel silver | 274 | 315 | 16¢ | + 35 | 51 |
| Rubber, bone, celluloid, pyroxylin, casein or similar material | 13,441 | 4,780 | 8¢ | + 35 | 58 |
| Wood, or wood and steel, or handles of nickel silver, or steel other than austenitic: | | | | | |
| Less than 4" long, exclusive of handle | 23,867 | 3,130 | 2¢ | + 25 | 42 |
| 4" long or over, exclusive of handle | 6,194 | 1,965 | 4¢ | + 25 | 38 |

Continued on following page.

FIXED BLADE CUTLERY--Continued

Fixed blade cutlery: United States imports for consumption, by kind, rates of duty, and ad valorem equivalents of rates of duty, 1939--Continued

| Item | Imports | | Rate of duty | | | Ad valorem equivalent of rate of duty |
|---|---|---|---|---|---|---|
| | Quantity | Value | Specific | Ad val. | | |
| | Number | | Each | Percent | | Percent |
| Hunting, curriers', farriers', hay, etc.--Cont'd.: | | | | | | |
| Other material: | | | | | | |
| Less than 4" long, exclusive of handle | 1,960 | $483 | 2¢ | + | 35 | 1/ 43 |
| 4" long or over, exclusive of handle | 1,245 | 666 | 8¢ | + | 35 | 1/ 50 |
| Without handles: | | | | | | |
| Blades less than 6" in length | - | - | 2¢ | + | 25 | - |
| Blades 6" or more in length | 6,463 | 1,795 | 4¢ | + | 25 | 39 |
| Subtotal | 54,043 | 13,776 | | | | |
| Table, kitchen, butchers', and similar cutlery, cleavers, forks, and steels: | | | | | | |
| With handles: | | | | | | |
| Mother-of-pearl, shell, ivory, and horn | 7,883 | 5,012 | 8¢ | + | 25 | 43 |
| Plated with silver and in chief value of silver | 7,440 | 7,813 | 10¢ | + | 25 | 36 |
| Silver (except silver plated) or metal other than iron or steel, nickel silver, and aluminum | 41,093 | 74,586 | 16¢ | + | 35 | 44 |
| Rubber, bone, celluloid, pyroxylin, casein, or similar material: | | | | | | |
| Table cutlery | 34,467 | 8,122 | 4¢ | + | 25 | 42 |
| Kitchen, butchers', and similar cutlery | 16,199 | 3,760 | 8¢ | + | 35 | 69 |
| Nickel silver or steel, other than austenitic: | | | | | | |
| Less than 4" long, exclusive of handle: | | | | | | |
| Table cutlery | 8,427 | 1,602 | 2¢ | + | 25 | 36 |
| Kitchen, butchers', and similar cutlery | 3,956 | 413 | 2¢ | + | 35 | 54 |
| 4" long or over, exclusive of handle: | | | | | | |
| Table cutlery | 10,644 | 3,487 | 4¢ | + | 25 | 38 |
| Kitchen, butchers', and similar cutlery | 6,751 | 1,731 | 8¢ | + | 35 | 67 |
| Other material, including wood, or wood and steel: | | | | | | |
| Less than 4" long, exclusive of handle: | | | | | | |
| Table cutlery | 40,104 | 7,957 | 2¢ | + | 25 | 36 |
| Kitchen, butchers', and similar cutlery | 79,430 | 11,438 | 2¢ | + | 35 | 55 |

Continued on following page.

FIXED BLADE CUTLERY--Continued

Fixed blade cutlery: United States imports for consumption, by kind, rates of duty, and ad valorem equivalents of rates of duty, 1939--Continued

| Item | Imports | | Rate of duty | | Ad valorem equivalent of rate of duty |
|---|---|---|---|---|---|
| | Quantity | Value | Specific | Ad val. | |
| | Number | | Each | Percent | Percent |
| Table, kitchen, butchers', and similar cutlery, etc.: Cont'd. | | | | | |
| With handles--Cont'd.: | | | | | |
| Other material, including wood, or wood and steel: | | | | | |
| 4" long or over, exclusive of handle: | | | | | |
| Table cutlery | 28,850 | $9,176 | 4¢ | + 25 | 39 |
| Kitchen, butchers', and similar cutlery | 149,773 | 62,857 | 8¢ | + 2/ 35 | 2/ 60 |
| Without handles: | | | | | |
| Blades less than 6" in length | 35,834 | 3,912 | 2¢ | + 25 | 43 |
| Blades 6" or over in length | 35,884 | 10,125 | 4¢ | + 25 | 41 |
| Subtotal | 506,735 | 211,991 | | | |
| Total | 561,778 | 225,767 | | | |

1/ Corrected.

2/ This item in 1939 included 63,972 knives valued at $36,405 imported from Germany, and hence not entitled to the rates prescribed in trade agreements. On these the rate was 8 cents each plus 45 percent ad valorem. But since the German knives averaged 57 cents each, and the other knives averaged less than 31 cents each, the ad valorem equivalent on the German knives works out at 57 percent and on the other knives at 61 percent. The other knives were chiefly from France, the United Kingdom, and Sweden.

Source: Official statistics of the U. S. Department of Commerce.

## Comment

Fixed blade cutlery falls into three main classes: (1) Table cutlery, (2) butchers' and kitchen cutlery, and (3) artisans' cutlery. The last being of less importance than the other two classes.

Fixed blade cutlery is made in a multiplicity of types resulting from diverse uses and from varied combinations of handle and blade materials. Products range in size and pattern from small artisans' knives, such as palette knives, to beet-topping knives 12 to 18 inches long with straight or hooked blades and hay knives 3 feet long with two handles and a serrated blade. In price, fixed blade cutlery varies from inexpensive silver-plated table cutlery and paring knives sold in chain stores to high quality butchers' and sportsmen's cutlery sold in hardware stores and expensive sterling-silver table cutlery sold in jewelry stores.

In the United States market table cutlery with silver-plated and sterling-silver handles is the most important group from the standpoint of volume and value of sales. Other types of table cutlery include goods with handles of wood, hard rubber, bone, and synthetic materials, and those made in one piece of nickel silver or carbon steel. The latter are plated with nickel or chromium, or tinned. Blades for table cutlery are made of stainless steel or iron, or carbon steel. Table cutlery with handles of mother-of-pearl, shell, ivory, and horn has been largely replaced with cheaper but more durable types.

FIXED BLADE CUTLERY--Continued

Butchers', as well as high-grade cooks' knives, forks, and steels, are made of crucible or special steels; are hammer forged, hand ground, and fabricated throughout by expert craftsmen. The continuous use to which professional knives are put makes their durability and reliability of greater consequence than that of ordinary kitchen knives. The latter are not usually hammer forged but are blanked from sheet or strip metal, and the grinding and polishing are done by machine. Artisans' knives include both high-grade tools with blades of crucible or special steel, hammer forged, and tools of lower quality with blades blanked from less expensive steel. Hunting and sportsmen's knives vary greatly in quality and finish.

Domestic supplies of practically all raw materials required in the fabrication of fixed blade cutlery are ample. Some handle materials, such as certain hardwoods, are imported. Articles purchased by the fixed blade cutlery industry include unhafted blades; the sterling-silver-table-cutlery industry purchases most of its blades.

Over 100 firms are engaged in the domestic production of table, butchers', kitchen, and similar cutlery. About 20 firms are of outstanding importance in each of the main branches of the industry; the remainder are small concerns producing one or more types of cutlery and concerns making cutlery as one of a number of lines. Manufacture is concentrated on the eastern seaboard; New England, New York, New Jersey, and Pennsylvania have the largest output.

Detailed production statistics are given below.

Fixed blade cutlery: United States production, by kind, 1937 and 1939

(In thousands of dollars)

| Item | 1937 | 1939 |
|---|---|---|
| Table and kitchen cutlery, not including silver-plated and sterling silver | 4,633 | 4,936 |
| Butchers' knives and cleavers: | | |
| Knives | 1,191 | 1,681 |
| Cleavers | 121 | 152 |
| Sterling silver flatware (includes cutlery) 1/ | 9,506 | 9,897 |
| Silver-plated flatware (includes cutlery): 1/ | | |
| Hotel | 2,642 | 2,411 |
| Commercial | 22,055 | 23,009 |
| Nickel silver flatware (includes cutlery) 1/ | 510 | 376 |
| Other metals: | | |
| Flatware (includes cutlery) 1/ | n.a. | 2,891 |
| Total 1/ | 40,658 | 45,353 |

1/ In addition to cutlery, flatware includes spoons, which are produced in substantial volume. Cutlery (knives and forks), however, represents an unknown but substantial portion of the total value of flatware production.

Source: Official statistics of the U. S. Department of Commerce.

During the war, producers in the United States and abroad greatly increased the production of cutlery and other products for military use. Production of silver-plated and sterling silver articles in the United States was limited to 50 percent of 1941 or 1942 output.

FIXED BLADE CUTLERY--Continued

Domestic exports, in order of importance, consist of butchers' and kitchen knives, table cutlery (other than silver), silver-plated cutlery, and sterling-silver cutlery. Canada, Cuba, and South American countries have been the leading foreign markets for American manufacturers.

Imports include practically all types of fixed blade cutlery. In prewar years table, kitchen, butchers', and similar cutlery comprised the bulk of imports. Denmark and the United Kingdom were the most important sources of sterling-silver table cutlery imports, and Germany and the United Kingdom of butchers' and kitchen cutlery. Imports of artisans' cutlery were chiefly from Finland; the United Kingdom, Sweden, Germany, France, and Denmark also participated in the trade. The United Kingdom was the leading source of imports of unhafted blades.

In 1943, with former important foreign suppliers inactive, there was a change both in the character and in the principal sources of the United States import trade. Mexico and Canada became the principal sources of imports, Mexico supplying the bulk of the imports of artisans' cutlery while Canada supplied the major portion of the imported table, kitchen, and butchers' cutlery. Mexico will probably continue to be a more important source of imports than in prewar years.

Competition in the prewar period varied greatly with individual items. Generally speaking, the domestic market for low- and medium-priced table and kitchen cutlery was supplied chiefly by types produced in large volume by highly mechanized methods in the United States. Import competition was largely confined to goods with prestige value, to quality goods produced at lower costs in certain foreign countries with long manufacturing experience, and to specialties. In sterling-silver table cutlery, the individual import item with the highest value in prewar years, imports consisted largely of popular designs of foreign manufacturers and of prestige goods. Other types of table cutlery imported in largest volume included relatively low-priced articles with handles of plastics, wood, or wood and steel. In butchers' and high -grade chefs' knives, demand in the domestic market is partly from chefs and butchers of foreign birth, who tend to prefer foreign cutlery. Blanked blades have been found satisfactory for ordinary table and kitchen use but there is a preference for knives with forged blades for professional use. In artisans' knives, standard types produced in the United States frequently differ from those of foreign countries and tend to limit this trade to domestic products. Specialties in hunting and similar knives are subject to the whims and preferences of buyers.

Table, kitchen, butchers', and similar cutlery, and hunting, curriers', and similar knives: United States imports for consumption, by kinds, by principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Hunting, curriers', farriers', hay, tanners', painters', shoe, beet-topping, and similar knives | $13,776 | Finland, $8,617; UNITED KINGDOM, $2,631; Sweden, $750; Germany, 1/ $571 |
| Table, kitchen, butchers', and similar cutlery, cleavers, forks, and steels | 211,991 | Denmark, $70,394; UNITED KINGDOM, $49,469; Germany, 1/ $47,097; France, $18,977 |

1/ Includes Austria.
Source: Official statistics of the U. S. Department of Commerce.

FIXED BLADE CUTLERY--Continued

The duties on fixed blade cutlery were reduced by from one-fifth to one-half in the trade agreement with the United Kingdom, effective January 1, 1939 (these reduced rates did not apply to imports from Germany). Notwithstanding this, the imports from the United Kingdom in 1939 showed decrease rather than increase, a fact attributable to the disturbed economic and political conditions in that year.

# PRUNING AND SHEEP SHEARS AND BLADES

Stat. import classes (1939): 6118.0-2

United States production, exports, and imports, 1937-39 and 1943

| Year | Production 1/ | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Germany 2/ | Switzerland |
| | Quantity (number) | | | | | |
| 1937 | Not available | Not available | 19,355 | 7,938 | 5,700 | 1,945 |
| 1938 | | | 10,471 | 4,908 | 3,577 | 312 |
| 1939 | | | 32,129 | 28,219 | 1,716 | 820 |
| 1943 | | | - | - | - | - |
| | Value (dollars) | | | | | |
| 1937 | 1,727,100 | Not available 3/ | 14,571 | 6,366 | 3,626 | 2,898 |
| 1938 | n.a. | | 8,374 | 3,970 | 3,105 | 415 |
| 1939 | 1,389,806 | | 24,803 | 21,577 | 1,524 | 1,169 |
| 1943 | n.a. | | - | - | - | - |

1/ Includes tinners' snips. 2/ Includes Austria beginning 1938.
3/ Exports of scissors, shears, and snips of all kinds were valued at $154,351 in 1939; exports of pruning and sheep shears probably did not exceed $50,000 annually.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiatin country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 357 | | | |
| Pruning and sheep shears, and blades therefor, finished or unfinished: | | | |
| Valued not over 50¢ per dozen | 3½¢ ea. + 45% ad val. | 3½¢ ea. + 45% ad val. | UNITED KINGDOM |
| Valued over 50¢, and not over $1.75 per dozen | 15¢ ea. + 45% ad val. | 15¢ ea. + 45% ad val. | do |
| Valued over $1.75 per dozen | 20¢ ea. + 45% ad val. | 10¢ ea. + 22½% ad val. | do |

1/ Trade agreement with the United Kingdom, effective January 1939.
Note.- See table below for ad valorem equivalents of rates of duty.

## Comment

There are three principal types of pruning shears: A single-hand type design for pruning vines and the like, long-handled lopping shears used in heavier types of pruning, and tree pruners. The latter are mounted on poles and have an operating handle at the lower end. Sheep shears are of a single characteristic design.

Pruning and sheep shears vary in quality to meet the requirements of home and professional users. All types are heavily constructed and many are finely fitted and made of the best materials. Designs for home use are usually of a somewhat lower grade and lower priced than those required by professional horticulturists

and sheep shearers. Blades for pruning and sheep shears are either forged or die pressed.

The United States industry is composed of about 15 companies who either make pruning and sheep shears along with other types of scissors and shears or specialize in one or two particular types. States with important production include New Jersey, Connecticut, Kentucky, Ohio, Pennsylvania, and Wisconsin. Domestic products are almost entirely of forged-steel construction, only a small proportion consisting of the cheaper obvious grades made of cast or pressed metals. Domestic consumption of sheep shears has been affected in recent years by the increased use of electrically operated clippers.

The United Kingdom has been the leading source of imports. English sheep shears, as well as some pruning shears, have a prestige value with some customers, especially with gardeners of English birth. Other suppliers of imports have been Germany, Switzerland, and France.

Imports have consisted almost wholly of the better grade foreign goods with an average value in 1939 of over $8.00 a dozen (foreign value). Imports in the two lower value brackets described in the tariff act have been insignificant, having been excluded by some of the highest rates in the United States Tariff.

The compound duty on the highest value bracket of pruning and sheep shears was reduced one-half by the trade agreement with the United Kingdom, effective January 1, 1939. The duties on the two lower brackets, which even before that time had been much higher than that on the upper bracket, were not reduced, presumably because these cheap articles are unimportant in both domestic and British production and because even a maximum reduction in the rates would probably have resulted in only insignificant imports. In 1939, after the trade agreement, imports of the higher-priced shears were much larger than theretofore, and the United Kingdom was the dominant supplier, notwithstanding the disturbed political and economic conditions which had prevented an increase in imports of other classes of cutlery from that country.

The following table shows the range and height of the present rates, and the abruptness of the transitions from one bracket to the next.

Duties on pruning and sheep shears and blades

| Value | Duty | Duty | Ad valorem equivalent |
|---|---|---|---|
| Per dozen | Rate per dozen | Amount per dozen | Percent |
| Not over $0.50 | $0.42 | | |
| If valued at 20¢ | plus | 42¢ + 9¢, or 51¢ | 255 |
| If valued at 50¢ | 45% | 42¢ + 22½¢, or 64½¢ | 129 |
| $0.501 to $1.75 | $1.80 | | |
| If valued at 51¢ | plus | $1.80 + 23¢, or $2.03 | 400 |
| If valued at $1.00 | | $1.80 + 45¢, or 2.25 | 225 |
| If valued at $1.75 | 45% | $1.80 + 79¢, or 2.59 | 148 |
| Over $1.75 | $1.20 | | |
| If valued at $1.76 | | $1.20 + 40¢, or $1.60 | 90 |
| If valued at $2.00 | plus | $1.20 + 45¢, or 1.65 | 82.5 |
| If valued at $4.00 | | $1.20 + 90¢, or 2.10 | 52.5 |
| If valued at $8.00 | 22½% | $1.20 + $1.80, or 3.00 | 37.5 |

PRUNING AND SHEEP SHEARS AND BLADES-Continued

Pruning and sheep shears and blades: United States imports for consumption, by kind, by principal sources, with equivalent ad valorem of the duty, 1939

| Item | Total value of imports | Ad valorem equivalent | Principal sources |
|---|---|---|---|
| Pruning and sheep shears and blades for: | | | |
| Valued not over 50¢ per dozen | $3 | 204 | China, $3. |
| Valued over 50¢ and not over $1.75 per dozen | 64 | 197 | UNITED KINGDOM, $64. |
| Valued over $1.75 per dozen | 24,736 | 37 | UNITED KINGDOM, $21,513; Germany, 1/ $1,524; Switzerland, $1,169. |

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

SCISSORS AND SHEARS, (EXCEPT PRUNING AND SHEEP SHEARS AND SURGICAL SCISSORS AND SHEARS), AND BLADES THEREFOR

Stat. class (1939): 6118.3-5

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | Germany 1/ | France | UNITED KINGDOM |
| | Quantity (number) | | | | | |
| 1937 | Not available | Not available | 237,806 | 162,360 | 2,363 | 12,005 |
| 1938 | | | 127,754 | 91,322 | 8,467 | 10,822 |
| 1939 | | | 105,946 | 78,060 | 14,076 | 5,283 |
| 1943 | | | 739 | - | - | 508 |
| | Value (dollars) | | | | | |
| 1937 | 4,704,916 | Not available 2/ | 92,635 | 75,794 | 1,057 | 7,829 |
| 1938 | n.a. | | 59,806 | 44,852 | 1,836 | 8,357 |
| 1939 | 5,290,357 | | 48,082 | 41,583 | 3,468 | 2,056 |
| 1943 | n.a. | | 768 | - | - | 657 |

1/ Includes Austria beginning 1938.

2/ Exports of scissors, shears, and snips of all kinds were valued at $154,351 in 1939; exports of scissors and shears described herein probably did not exceed $50,000 annually.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 357: | | | |
| Scissors and other shears (except pruning and sheep shears), finished or unfinished, and blades for same: | | | |
| Valued not over 50¢ per dozen -- | 3½¢ ea. + 45% ad val. | 3½¢ ea. + 45% ad val. | UNITED KINGDOM |
| Valued over 50¢, not over $1.75 per dozen ---------- | 15¢ ea. + 45% ad val. | 15¢ ea. + 45% ad val. | do |
| Valued over $1.75 per dozen ---- | 20¢ ea. + 45% ad val. | 20¢ ea. + 45% ad val. | do |

Note.- See table below for ad valorem equivalents of rates of duty.

## Comment

Scissors and shears of greatest commercial importance included herein are household and office scissors and shears, manicure scissors, dressmakers', tailors', and barbers' shears, electricians' sicissors, poultry shears, and other special trade scissors and shears. Pruning and sheep shears, the subject of a separate digest, differ from the above in construction, materials, methods of manufacture, and quality of workmanship.

SCISSORS AND SHEARS, (EXCEPT PRUNING AND SHEEP SHEARS AND SURGICAL SCISSORS AND SHEARS), AND BLADES THEREFOR-Continued

From a manufacturing standpoint, there are three principal types of general purpose scissors and shears: Forged scissors and shears, machine-hammered and shaped from hot steel bars; cast iron scissors and shears produced by casting the metal in sand molds; and cold-pressed scissors stamped from cold low-carbon sheet metal or wire. The latter are made only in the smaller sizes. Forged and cast products are considered superior to cold pressed products but the latter are satisfactory where sharpness and durability are not as essential as low cost, as in children's scissors. Machine-forged types predominate in domestic production but all grades are made.

Consumption of household and trade scissors has been affected in recent years by changes in the habits of housewives who are becoming more inclined to buy ready-made clothing, and by the increasing use of electrically driven cloth cutters in the textile industry.

The domestic industry consists of about 20 firms whose principal products are scissors and shears. Raw materials are for the most part of domestic origin. Pig iron from India is used by some manufacturers of cast iron scissors and shears because of its high silicon and low sulphur and phosphorus content.

Imports include some goods distinctly foreign in style and craftmanship that have no American counterparts and other goods similar in all physical characteristics to domestic products. Germany was the predominant source of prewar imports. The United Kingdom and France were the most important secondary sources. Japan, China, Denmark, and Sweden also participated in the trade to a limited extent. Imports from Germany included both high- and low-grade products; those from the United Kingdom, France, Denmark, and Sweden were almost exclusively of high quality; imports from Japan and China had extremely low unit values, and were subject to very high duties. Since American manufacturers supplied the bulk of the demand for general purpose scissors and shears, prewar competition of imports was confined to quality goods that had a certain prestige value. Some imported types were marketed to tailors and barbers of foreign birth who had a preference for products of certain foreign countries. Other imports were ornate types of characteristic foreign design.

SCISSORS AND SHEARS, (EXCEPT PRUNING AND SHEEP SHEARS AND SURGICAL SCISSORS AND SHEARS), AND BLADES THEREFOR--Continued

Scissors and shears, n.e.s., and blades: United States imports for consumption by kinds, by principal sources, 1939

| Item | Ad valorem equivalent of the duties | Total value of Imports | Principal sources |
|---|---|---|---|
| | Percent | | |
| Scissors and shears and blades: | | | |
| Valued not over 50¢ per dozen | 195 | $174 | China, $99; Germany 1/ $37; Japan, $19; Czechoslovakia, $19 |
| Valued over 50¢ not over $1.75 per dozen | 199 | 602 | UNITED KINGDOM, $203; Germany 1/ $171; France, $168 |
| Valued over $1.75 per dozen | 84 | 47,306 | Germany 1/ $41,375; France, $3,300; UNITED KINGDOM, $1,853 |

1/ Includes Austria

Source: Official statistics of the U. S. Department of Commerce.

CLIPPERS: NAIL, BARBERS', AND ANIMAL

Stat. import class (1939): 6118.6-.8

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from— | | | |
|---|---|---|---|---|---|---|
| | | | All countries | France | Germany 1/ | UNITED KINGDOM |
| | Quantity (number) | | | | | |
| 1937 | Not available | Not available | 8,744 | - | 4,318 | 3,575 |
| 1938 | | | 3,145 | 234 | 2,405 | 130 |
| 1939 | | | 5,413 | 4,079 | 1,271 | 33 |
| 1943 | | | 5 | - | 1 | 4 |
| | Value (dollars) | | | | | |
| 1937 | 1,172,000 | Not available 2/ | 5,010 | - | 2,042 | 2,719 |
| 1938 | n.a. | | 2,124 | 91 | 1,605 | 302 |
| 1939 | 1,202,000 | | 1,320 | 766 | 508 | 27 |
| 1943 | n.a. | | 10 | - | 1 | 9 |

1/ Includes Austria beginning 1938.
2/ Estimated at about $50,000 annually.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 357 | | | |
| Clippers: Nail, barbers', and animal, and blades therefor, finished or unfinished: | | | |
| Valued not over 50¢ per dozen | 3½¢ ea. +45% ad val. | 3½¢ ea. +45% ad val. | UNITED KINGDOM |
| Valued over 50¢ and not over $1.75 per dozen | 15¢ ea. +45% ad val. | 15¢ ea. +45% ad val. | do. |
| Valued over $1.75 per dozen | 20¢ ea. +45% ad val. | 20¢ ea. +45% ad val. | do. |

Comment

Barbers' and animal clippers are the major items considered herein; nail clippers are of lesser importance in domestic production and consumption.

Ordinary hand-operated barbers' and animal clippers are similarly constructed, being equipped with two blades with cutting teeth which give a shearing action when they pass over each other. Barbers' clippers include the professional type used in barber and beauty shops and a somewhat smaller size designed for home use. Animal clippers include those used by farmers, dairymen, and horsemen, and specially designed types for owners of pets. Hand-operated barbers'

CLIPPERS: NAIL, BARBERS', AND ANIMAL--Continued

clippers have been supplanted to a certain extent by electrically operated clippers. Mechanically operated animal clippers are equipped with a crank and a cutting head mounted on a flexible shaft.

The domestic industry consists of about a dozen companies, located in Wisconsin, Rhode Island, New Hampshire, New Jersey, Illinois, Missouri, and New York. Two firms produce the bulk of the output. Production in 1939 was divided as follows:

| | Produced in clipper industry | Produced in other industries | Total |
|---|---|---|---|
| Clippers: | | | |
| Hand | $568,870 | $78,210 | $647,080 |
| Electric | 555,378 | - | 555,378 |

Hand-operated barbers' clippers imported under the provisions of the highest value bracket comprise the bulk of imports. Small quantities of nail clippers and clipper blades have been imported in the lower value brackets, but in the lowest bracket none were imported in 1939. The compound duty on this bracket is equivalent to 129 percent on articles valued at exactly 50 cents a dozen, rising with every decrease in the valuation and reaching 255 percent ad valorem if the article is valued at only 20 cents a dozen. In the second bracket only a few articles valued near the top of the range of values were brought in; the compound rates are equivalent to 400 percent ad valorem on articles valued at 51 cents per dozen, decreasing to 148 percent ad valorem on articles valued at $1.75 per dozen. Actual imports in 1939 in this bracket averaged the equivalent of 154 percent ad valorem. In the highest bracket the equivalent of the duty is 181 percent ad valorem if the valuation be only $1.76 per dozen but as the valuation rises, the equivalent decreases reaching 118 percent at a valuation of $3.30 per dozen, which was the average value of the imports in 1939. If articles should come in valued at $6.00 a dozen the equivalent on them would be 85 percent ad valorem.

Imports from Germany, the principal source, have been of characteristically good quality. Other sources have been France, the United Kingdom, Czechoslovakia, Switzerland, Sweden, and Japan. Imports from Japan have been in the two lower value brackets. German barbers' clippers have been favored to a certain extent in the domestic barber trade. These articles, professional in nature, are not subject to as much competition with regard to price as toilet and nail clippers. The demand for animal clippers is supplied almost entirely by domestic manufacturers.

Nail, barbers', and animal clippers: United States imports for consumption, by kinds, by principal sources, with ad valorem equivalent of the duty, 1939

| Item | Total value of imports | Ad valorem equivalent | Principal sources |
|---|---|---|---|
| | | Percent | |
| Clippers: Nail, barbers', and animal, and blades: | | | |
| Valued not over 50 cents per dozen | - | - | - |
| Valued over 50 cents and not over $1.75 per dozen | $169 | 154 | France, $169 |
| Valued over $1.75 per dozen | 1,151 | 118 | France, $597, Germany,[1] $508; UNITED KINGDOM, $27; Sweden, $19 |

[1] Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

# SAFETY RAZORS, HANDLES, FRAMES, AND BLADES

Stat. import class (1939): 6117.0-2

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from— | | |
|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Germany 1/ |
| | Value (dollars) | | | | |
| 1937 --- | 2/ 18,700,934 | 973,333 | 73,347 | 63,697 | 8,708 |
| 1938 --- | n.a. | 1,014,667 | 41,670 | 37,560 | 3,439 |
| 1939 --- | 19,220,262 | 1,125,474 | 63,664 | 61,361 | 1,727 |
| 1943 --- | n.a. | 3/ 2,612,436 | 4/ 142,944 | 16,891 | - |

1/ Includes Austria beginning 1938.
2/ Safety razor blades only; production of safety razors was not recorded separately.
3/ Includes $151,738 exported under lend-lease.
4/ Includes imports from Canada valued at $119,237; imported free as an act of international courtesy.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating Country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 358 | | | |
| Safety razors, handles, and frames | 10¢ ea. + 30% ad val. | 5¢ ea. + 15% ad val. 1/ | UNITED KINGDOM |
| Blades for safety razors: | | | |
| In strips | 1/2¢ ea. + 30% ad val. | 1/2¢ ea. + 15% ad val. 1/ | do |
| All other, finished or unfinished | 1¢ ea. + 30% ad val. | 1/2¢ ea. + 15% ad val. 1/ | do |

1/ Trade agreement with the United Kingdom, effective January 1939.
Note. See table below for ad valorem equivalents of rates of duty.

## Comment

The United States leads the world in the production, consumption, and export of safety razors and blades. Both holders and blades are relatively inexpensive, and holders are sold at very low prices, manufacturers profiting from the continued sale of the necessary blades. Holders are made of steel or brass (plated with chromium, nickel, silver or gold) or of rubber or plastics. Blades are commonly made of high-grade strip steel. Both holders and blades are well adapted to quantity production methods.

Three general types of blades are produced: Thin flexible blades with double cutting edges, which are discarded when dull; rigid blades of thicker steel with single or double edge, some of which can be stropped; and forged hollow ground blades whose life can be prolonged indefinitely by honing and stropping.

SAFETY RAZORS, HANDLES, FRAMES, AND BLADES-Continued

Domestic production comprises two principal types of holders, those designed for thin flexible blades with double cutting edge and those designed for rigid blades with a single or double cutting edge. Both flexible and nonflexible blades, with single or double cutting edges, are produced domestically on a mass-production basis. Few if any forged hollow ground blades are made in the United States.

The United States industry is composed of about 35 companies, of which about a dozen produce both holders and blades and the remainder blades only. The two most important producers have foreign subsidiaries. The industry is centered in Massachusetts and the New York metropolitan area. Production and export figures are shown below.

Safety razors and blades: United States production and exports, by classes, 1939 and 1943

(In thousands)

| | 1939 | | 1943 | |
|---|---|---|---|---|
| | Number | Value | Number | Value |
| Production: | | | | |
| Safety razors | 10,457 | $1,635 | n.a. | n.a. |
| Safety razor blades: | | | | |
| Number reported | 1,905,770 | 17,109 | n.a. | n.a. |
| Number not reported | | 476 | n.a. | n.a. |
| Subtotal (blades) | | 17,585 | | |
| Total value | | 19,220 | | |
| Exports: | | | | |
| Safety razors | 729 | 134 | 509 | $118 |
| Safety razor blades | 89,651 | 991 | 210,354 | 2,494 |

Source: Official statistics of the U. S. Department of Commerce.

In 1944 there were 3,659 million safety razor blades produced in the United States, and in the second quarter of 1945 more than 1 billion.

The United Kingdom was the principal prewar source of imports of safety razors. A type with a hollow ground blade which is accompanied by a sharpening device was one of the leading imports. Limited imports were received also from Germany, France, Canada, and Sweden. Blades came from the above countries, also from Czechoslovakia, Japan, and Switzerland. Sweden, France, and Japan were the chief sources of the small imports of blades in strips.

Competition from imports is limited by a number of factors. The production of holders and blades is well adapted to mass-production methods in which American manufacturers excel; the method of distribution employed by manufacturers favors the home producer; imports are limited by requirement that imported blades be die sunk with the name of the foreign manufacturer, as well as by the duties. The requirement that blades be die sunk with the name of the manufacturer is difficult to accomplish without injury to thin blades.

The duties on safety razors and blades were sharply reduced by the trade agreement with the United Kingdom, effective January 1, 1939. Nevertheless, the imports in 1939 were smaller than in 1937, presumably because of the then generally disturbed political and economic conditions.

SAFETY RAZORS, HANDLES, FRAMES, AND BLADES-Continued

Safety razors, handles, frames, and blades: United States imports for consumption, by kinds, by principal sources, with ad valorem equivalent of the duty, 1939

| Item | Total value | Ad valorem equivalent | Principal sources |
|---|---|---|---|
| | | Percent | |
| Safety razors, handles, and frames | $51,863 | 20 | UNITED KINGDOM, $51,530; France, $270; Germany,1/ $56; Canada, $7 |
| Blades, in strips | 217 | 123 | France, $95; Sweden, $81; Japan, $41 |
| Other blades, finished or unfinished | 11,584 | 23 | UNITED KINGDOM, $9,831; Germany,1/ $1,671; Palestine, $82 |

1/ Includes Austria

Source: Official statistics of the U. S. Department of Commerce.

RAZORS (EXCEPT SAFETY RAZORS AND ELECTRIC SHAVERS) AND PARTS
(See separate digest on safety razors, par. 358; electric shavers are dutiable in par. 353, CIE 427/40)

Stat. import classes (1939): 6117.3, 6117.4, 6117.5, and 6117.6

United States production, exports, and imports, 1937-39 and 1943

| Year | Production 1/ | Domestic exports | Imports for consumption 2/ from-- | | |
|---|---|---|---|---|---|
| | | | All countries | Germany 3/ | UNITED KINGDOM |
| | Quantity (number) | | | | |
| 1937 | 109,810 | Not available (negligible) | 160,701 | 155,066 | 4,678 |
| 1938 | n.a. | | 100,812 | 98,619 | 1,965 |
| 1939 | n.a. | | 87,771 | 83,083 | 3,786 |
| 1943 | n.a. | | 4/ 1,033 | - | - |
| | Value (dollars) | | | | |
| 1937 | 89,932 | Not available (negligible) | 98,443 | 93,382 | 4,627 |
| 1938 | n.a. | | 62,087 | 59,721 | 2,265 |
| 1939 | 95,220 | | 58,682 | 54,913 | 3,393 |
| 1943 | n.a. | | 4/ 1,114 | - | - |

1/ Production figures represent number (where available) and value of razors only.
2/ Import figures represent number and value of razors and razor parts.
3/ Includes Austria beginning 1938.
4/ Principally from Sweden.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 358 | | | |
| Razors (except safety razors and electric shavers) and parts thereof, finished or unfinished: | | | |
| Valued at less than 75¢ per doz. | 18¢ ea. + 30% ad val. | 18¢ ea. + 30% ad val. | UNITED KINGDOM |
| Valued 75¢ and less than $1.50 per doz. | 25¢ ea. + 30% ad val. | 25¢ ea. + 30% ad val. | do. |
| Valued $1.50 and less than $3 per doz. | 30¢ ea. + 30% ad val. | 30¢ ea. + 30% ad val. | do. |
| Valued $3 and less than $4 per doz. | 35¢ ea. + 30% ad val. | 35¢ ea. + 30% ad val. | do. |
| Valued $4 or more per doz. | 45¢ ea. + 30% ad val. | 45¢ ea. + 30% ad val. | do. |

Note.- See table below for ad valorem equivalents of rates of duty.

RAZORS (EXCEPT SAFETY RAZORS AND ELECTRIC SHAVERS) AND PARTS-Continued

Comment

Domestic consumption of ordinary (straight) razors is limited. Competition from safety razors and electric shavers has greatly reduced the demand for straight razors, particularly from the largest group of purchasers--home users. The demand for straight razors is now largely confined to professional barbers who have a preference for certain foreign makes, mostly German. In 1939 United States production of straight razors comprised less than one-half of 1 percent of the total value of production of razors of all kinds.

The trend in both domestic production and imports has been downward in recent years. Prewar imports usually supplied one-half or more of the United States requirements; in some recent prewar years they exceeded production.

Straight razors do not lend themselves to mass production methods. Formerly they were hand forged. Dies and drop hammers or hydraulic presses are now commonly employed in initial processes and blades are finished on grinding wheels. The quality of the blade is of primary importance in the trade. Blades are usually made of high-grade steel. Straight razors are made in a wide range of shapes, finishes, and handle materials.

Six firms, located in New York, Massachusetts, Pennsylvania, and Illinois, some of whom produce other cutlery items, account for domestic output.

Germany, and to a lesser degree the United Kingdom, have long dominated the world trade.

Imports in the first two value brackets are mainly parts; they have been unimportant, no importations whatever having occurred in 1939. Imports in the highest value brackets are razors.

Razors and parts: United States imports for consumption, by kind, by principal sources, with ad valorem equivalent of the duty, 1939

| Item | Total value | Ad valorem equivalent | Principal sources |
|---|---|---|---|
| | | Percent | |
| Razors and parts: | | | |
| Valued less than 75¢ per dozen | None | - | |
| Valued 75¢ and less than $1.50 per dozen | None | - | |
| Valued $1.50 and less than $3 per dozen | $74 | 152 | Germany, 1/ $74. |
| Valued $3 and less than $4 per dozen | 1,165 | 138 | Germany, 1/ $988; France, $167; UNITED KINGDOM, $10. |
| Valued $4 or more per dozen | 57,443 | 96 | Germany 1/ $53,851; UNITED KINGDOM, $3,383; France, $188; Canada, $21. |

1/ Includes Austria.
Source: Official statistics of the U. S. Department of Commerce.

# HAY FORKS AND FOUR-TINED MANURE FORKS

(See digest on other agricultural hand tools, par. 373, and digests on cutlery, pars. 355, 357, and 358)

Stat. import classes (1939): 615.87, 615.88

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from -- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | Sweden | Czecho-slovakia | UNITED KINGDOM |
| | Quantity (number) | | | | | |
| 1937 | n.a. | 425,628 | 37,650 | 37,650 | - | N |
| 1938 | n.a. | 73,272 | 5,720 | 5,400 | 320 | O |
| 1939 | 1/ 2,500,000 | 133,776 | 2/ 16,080 | 16,080 | - | N |
| 1943 | n.a. | 3/ 37,560 | - | - | - | E |
| | Value (dollars) | | | | | |
| 1937 | n.a. | 190,426 | 8,223 | 8,223 | - | N |
| 1938 | n.a. | 38,484 | 1,417 | 1,244 | 173 | O |
| 1939 | 1/ 2,000,000 | 70,185 | 2/ 2,677 | 2,677 | - | N |
| 1943 | n.a. | 3/ 31,573 | - | - | - | E |

1/ Estimated. 2/ All imports were without handles and with blades 6 inches or more in length. 3/ Includes 25,152 valued at $17,232 exported under lend-lease.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 355 | | | |
| Hay forks and 4-tined manure forks, finished or unfinished, n.s.p.f.: | | | |
| With handles of any material other than those more specifically mentioned in par. 355, 4 inches in length or over, exclusive of handle | 8¢ + 45% ad val. 1/ | 2¢ + 12½% ad val. 2/ | UNITED KINGDOM |
| Without handles, with blades 6 inches or more in length | 8¢ + 45% ad val. 1/ | 2¢ + 12½% ad val. 2/ | UNITED KINGDOM |

1/ The duty was reduced to 4 cents each and 22½ percent ad valorem, effective April 1933, under Sec. 336 of the Tariff Act of 1930.
2/ Trade agreement with the United Kingdom, effective January 1939.
Note.- The duty on all imports in 1939 was equivalent to 24 percent ad valorem.

## Comment

Forks with handles of materials specially mentioned in par. 355 such as pearl, ivory, horn, silver, and rubber, are commonly used for household and commercial purposes and are dutiable at various rates; hay and manure forks, being wooden-handled, are dutiable at the rates shown above.

Two domestic producers supply most of the hay and manure forks used in the United States. Three grades are made, differing in quality of handle, weight, and finish. Skilled labor is required in forming the tines.

HAY FORKS AND FOUR-TINED MANURE FORKS-Continued

Great Britain, Sweden, and Germany are large producers. Some foreign forks are of the higher grades, others are inferior to the American in quality and finish.

Since 1936 imports have come almost wholly from Sweden. They have been of good grade but, because of the scarcity of ash in Sweden, birch has been used for handles. Importation from Sweden has been carried on mainly as an adjunct to much larger importations of other Swedish products. In 1934 and 1936 imports valued at about $9,000 total for the 2 years came from the United Kingdom.

Although the United Kingdom is a source of some of the knives and forks provided for in paragraph 355, there have been no imports of hay forks or 4-tined manure forks from that country for many years.

Although the duty was reduced by 50 percent in the trade agreement with the United Kingdom effective January 1, 1939, the imports in that year were much smaller than in 1937 and they came exclusively from Sweden.

MACHINE KNIVES AND BLADES

Par. No. 356
UNITED KINGDOM

Stat. import class (1939): 613.91

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports 1/ | Imports for consumption from--- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | Sweden | Germany 2/ | UNITED KINGDOM |
| | Quantity (number) | | | | | |
| 1937 | Not available 3/ | 90,932 | n.a. | | | |
| 1938 | | 110,270 | n.a. | | | |
| 1939 | | 121,721 | 472,615 | 158,993 | 296,658 | 11,729 |
| 1943 | | 4/ 283,068 | 5/ 193 | - | - | 100 |
| | Value (dollars) | | | | | |
| 1937 | Not available 3/ | 78,902 | n.a. | | | |
| 1938 | | 99,054 | n.a. | | | |
| 1939 | | 119,671 | 73,400 | 36,373 | 24,971 | 9,197 |
| 1943 | | 4/ 475,198 | 5/ 3,050 | - | - | 1,759 |

1/ Machine knives, only. 2/ Includes Austria beginning 1938.
3/ Large compared with imports (see text).
4/ Includes 34,196 valued at $51,142 exported under lend-lease.
5/ Includes 93 valued at $1,291 imported from Canada.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 356 | | | |
| Planing-machine knives, tannery and leather knives, tobacco knives, paper and pulp mill knives, shear blades, circular cloth and cork cutters, circular cigarette cutters, and all other cutting knives and blades used in power or hand machines (except knives and blades for meat-cutting, meat-slicing, or meat-chopping machines) ---------- | 20 | 1/ 20 | UNITED KINGDOM |

1/ Bound in the trade agreement with Sweden, effective August 1935, and with the United Kingdom, effective January 1939.

Comment

The machine knives and blades here under consideration are flat or circular edge tools used for chipping, cutting, planing, shaving, slicing or splitting wood, leather, paper, tobacco, and certain other nonmetallic materials. Separate statistics of United States production for these products are not available but for a broader group of commodities which includes machine knives, blades, dies, and their housings, the value of the domestic output was $4,485,665 in 1937 and $4,928,753 in 1939.

MACHINE KNIVES AND BLADES--Continued

Statistics of United States exports of machine knives are not strictly comparable with the statistics of imports. It is believed, however, that exports of the types of tools here considered have usually exceed imports of similar tools in past years.

United States imports have been very largely edge tools of the smaller sizes or shapes and tools for use on wood or paper have been the leading import items. The tools imported from Sweden and the United Kingdom have included some made of special steels.

Domestic producers have the competitive advantage over foreign producers of being near the domestic market and in a position to supply their customers more promptly with such replacement parts as machine knives and blades. Moreover, most of the machines now in use in the United States, which utilize knives and blades, are of domestic manufacture and users of such machines would ordinarily prefer to obtain their replacements of knives and blades from domestic producers.

# DENTAL AND SURGICAL NEEDLES AND DENTAL FORCEPS

Stat. import classes (1939): 9160.1-2; 9160.4-5

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Germany 1/ | |
| | Value (dollars) | | | | | |
| 1937 | Not available (see text) | Not available (see text) | 112,862 | 96,103 | 14,645 | |
| 1938 | | | 72,927 | 65,103 | 7,149 | |
| 1939 | | | 41,921 | 37,127 | 3,778 | |
| 1943 | | | 108,386 | 108,382 | - | |

1/ Includes Austria beginning 1938.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 359 | | | |
| Surgical instruments, and parts thereof, including hypodermic needles * * * composed wholly or in part of iron, steel, copper, brass, nickel, aluminum, or other metal * *: | | | |
| Hypodermic and other surgical needles | 55 | 55 | UNITED KINGDOM |
| Dental instruments, and parts thereof, including hypodermic needles, * * * and forceps, wholly or in part of iron, steel, copper, brass, nickel, aluminum, or other metal **: | | | |
| Hypodermic needles and extraction forceps | 35 | 35 | do. |

## Comment

United States production of needles and forceps is not available; total production of surgical and dental instruments except dental burrs and drills was valued at $6,331,886 in 1937 and $8,028,385 in 1939. However, these values include a wide variety of instruments which are not included in this discussion. The industry expanded appreciably during the war.

Imports have supplied a considerable part of the domestic demand for hypodermic needles and the greater part of the demand for other surgical needles; the United Kingdom has been practically the sole foreign source. Imports of dental forceps probably have been less than domestic production. Imports from Germany were valued at $7,900 in 1937 and $2,700 in 1939; since then the United Kingdom has been the principal source.

DENTAL AND SURGICAL NEEDLES AND DENTAL FORCEPS--Continued

There are no comparable figures for United States exports of the instruments discussed in this digest. The United States has had a substantial export trade in surgical instruments as a whole ($622,480 in 1939 and $497,360 in 1937). Exports of all types of dental instruments were $48,765, in 1939 and $43,981 in 1937. Probably some dental forceps were exported, but it seems likely that the exports of dental and surgical needles were negligible.

Dental and surgical needles and dental forceps: United States imports for consumption, by principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Dental hypodermic needles | $4,738 | UNITED KINGDOM, $4,297 |
| Dental extracting forceps | 4,852 | Germany 1/ $2,692; UNITED KINGDOM, $1,815 |
| Surgical hypodermic needles | 51 | UNITED KINGDOM, $51 |
| Other surgical needles | 32,280 | UNITED KINGDOM, $31,015 |

1/ Includes Austria.
Source: Official statistics of the U. S. Department of Commerce.

PYROMETERS AND MOISTURE TESTERS AND PARTS

Stat. import class (1939): 918.22

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from— | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Germany 1/ | |
| | Value (dollars) | | | | | |
| 1937 | Not available (see text) | Not available (see text) | 2/ 3,915 | - | 2/ 3,237 | |
| 1938 | | | - | - | - | |
| 1939 | | | 3,262 | 3,008 | 3 | |
| 1943 | | | 1,238 | 1,238 | - | |

1/ Includes Austria beginning 1938. 2/ Pyrometers only.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 360 | | | |
| Pyrometers and moisture testers which are scientific or laboratory instruments, apparatus, utensils, or appliances, and parts thereof, wholly or in chief value of metal, and not plated with gold, silver, or platinum, finished or unfinished, and n.s.p.f. | 40 | 1/ 25 | UNITED KINGDOM |

1/ Trade agreement with the United Kingdom, effective January 1939.

Comment

Pyrometers are used for the measurement of temperatures beyond the range of thermometers; some both measure and record temperatures. Moisture testers are used for determining the water content of solids, liquids, or gases. Only pyrometers and testers which are designed for use in scientific laboratories are included in the classification under discussion.

Separate production data for the scientific types are not available. The value of both industrial and scientific pyrometers and moisture testers manufactured in the United States was $5,482,000 in 1937 and $4,627,000 in 1939. As the output of the domestic industry has been of high quality and performance, imports have never been large. The United Kingdom and Germany have been the principal sources of United States imports.

After the reduction in the duty by the trade agreement with the United Kingdom effective January 1, 1939 (the reduced rate did not apply to imports from Germany), there were some imports from the United Kingdom, which had not previously been a supplier. If it had not been for the disturbed economic and political conditions at that time the imports might have been larger.

# INSTRUMENTS FOR DETERMINING STRENGTH OF MATERIALS

Stat. import class (1939): 918.27

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | |
|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Switzerland |
| | Value (dollars) | | | | |
| 1937 ---- | Not available (see text) | Not available (see text) | 1,169 | 368 | 801 |
| 1938 ---- | | | 1/ 5,637 | - | 3,667 |
| 1939 ---- | | | 7,237 | 3,625 | 3,252 |
| 1943 ---- | | | 2/ 892 | 592 | - |

1/ Includes $1,235 imported from Germany (including Austria).
2/ Free for Government use $300, all from Newfoundland and Labrador.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 360 | | | |
| Laboratory instruments, apparatus, or appliances, for determining the strength of materials or articles in tension, compression, torsion, or shear, and parts of the foregoing; any of the foregoing wholly or in chief value of metal, and not plated with gold, silver, or platinum, finished or unfinished, n.s.p.f. ---------- | 40 | 1/ 20 | UNITED KINGDOM |

1/ Trade agreement with Switzerland, effective February 1936.

## Comment

The testing machines under discussion are laboratory physical-testing equipment for one or more of the following factors: Compression, tension, torsion, shear, hardness, viscosity, abrasion resistance, friction, penetration, and impact. The variety of machines is extensive. Experimental devices are often developed by research or scientific laboratories and the working apparatus is produced by manufacturers of testing equipment. More machines are made for commercial than for laboratory use, but they lack the precision of the laboratory equipment.

No United States production data are available for either the total output or for those designed for research. A number of large and small manufacturers make this equipment as an associated line with machinery, apparatus, or other instruments.

United States imports, which have been small relative to both production and exports, have been largely hydraulic testing machines and hardness testers. Switzerland and the United Kingdom have been the principal sources.

Exports of testing machines are not separately recorded, but it is understood that domestic producers have supplied a substantial part of the demand in a number of foreign countries.

# BELLS (EXCEPT CHURCH BELLS AND CARILLONS)



Stat. import classes (1939): 679.03, 679.04, and 679.07

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from— | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | INDIA 1/ | CHINA | Japan | UNITED KINGDOM |
| | Value (dollars) | | | | | | |
| 1937 - | 100,000 annually 2/ | Not available 3/ | 17,682 | 327 | 5,017 | 9,750 | 648 |
| 1938 - | | | 13,476 | 1,946 | 3,776 | 2,073 | 635 |
| 1939 - | | | 28,473 | 12,092 | 5,397 | 1,815 | 1,806 |
| 1943 - | . . | | 2,552 | 1,166 | 2 | - | 603 |

1/ Includes Burma in 1937. 2/ Estimated. 3/ Probably less than $25,000 annually.
Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 364 | | | |
| Bells (except church and similar bells and carillons), finished or unfinished, and parts thereof: | | | |
| Bicycle, velocipede, and similar bells, finished or unfinished, and parts thereof ---- | 50 | 1/ 70 | UNITED KINGDOM |
| Other, and parts thereof ---------- | 50 | 50 | CHINA, INDIA |

1/ Presidential proclamation under sec. 336, Tariff Act of 1930, effective July 1931.

## Comment

The output of the small bell industry includes bicycle, velocipede, and similar bells; hand, tea, and call bells; sheep, cow, and other animal bells; sleigh bells, and bells used on costumes, toys, and the like.

Bell manufacturing, whether of large or small bells, is a highly specialized industry. Small bells are either pressed or cast from various metals, including bronze, steel, wrought iron, aluminum, silver, and gold, but bell metal, an alloy of copper and tin, is in most general use for such bells.

Bell making is an ancient industry, China being credited with the earliest production. In far eastern countries bells are commonly made of bronze and are of characteristic design. Hand and animal bells predominate in such production. Bicycle, velocipede, and similar bells are made chiefly of steel and then nickel plated. They have probably been produced in largest quantities in the United States, Germany, and Japan.

The domestic small bell industry consists of four producers, located in Connecticut. There is also some production of small bells by manufacturers of other metal products. Bicycle, velocipede, and similar bells are the major items in domestic output, but hand, tea, and call bells, animal and sleigh bells are of some importance.

BELLS (EXCEPT CHURCH BELLS AND CARILLONS)--Continued

Imports in recent years have come principally from far eastern countries and have consisted of a great variety of small bells, largely tea and animal bells. Before July 1931, when the duty on bicycle, velocipede, and similar bells was raised to 70 percent ad valorem, imports of bicycle bells from Germany were substantial. Similar bells have come also from Japan. China, Japan, British India, and the United Kingdom have been the leading sources of other types of small bells, but a number of countries have participated in this trade.

While the United States industry is well equipped to make small bells in large quantities by mechanical methods, certain factors limit production and consumption. The demand for bicycle bells has declined with the increased use of sirens and horns, and the demand for hand, tea, and call bells has been affected by the increased use of electric buzzers and chimes. Sleigh bells are no longer in much demand. The demand for other small bells, such as those used on costumes, toys, and the like, is inconsequential.

Bells (except church and carillons): United States imports for consumption, by kinds, with principal sources, 1939

| Kind | Total value | Principal source |
|---|---|---|
| Bicycle, velocipede, and similar bells, finished or unfinished | $760 | Japan, $540; UNITED KINGDOM, $141; China, $79 |
| Parts of bicycle, velocipede, and similar bells | 27 | UNITED KINGDOM, $27 |
| Other bells and parts | 27,686 | INDIA, $12,092; CHINA, $5,318; United Kingdom, $1,638 |

Source: Official statistics of the U. S. Department of Commerce.

## RIFLES, SHOTGUNS, AND PARTS

Stat. import classes (1939): 947.10-947.14, 947.40, 947.42, 947.44, 947.46, 947.48, 947.50, 947.51, 947.53-947.59

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | BELGIUM | UNITED KINGDOM | |
| | Quantity (number) | | | | | |
| 1937 | 1,465,295 | 102,354 | 92,399 | 92,062 | 177 | |
| 1938 | n.a. | 94,805 | 37,563 | 37,330 | 91 | |
| 1939 | 1,109,241 | 90,423 | 37,554 | 37,349 | 161 | |
| 1943 | n.a. | 1/ 580,188 | 10 | - | 1 | |
| | Value (dollars) | | | | | |
| 1937 | 14,634,587 | 977,497 | 2/ 293,326 | 246,588 | 35,895 | |
| 1938 | n.a. | 880,435 | 2/ 358,483 | 322,335 | 26,777 | |
| 1939 | 10,975,877 | 731,389 | 2/ 413,189 | 379,215 | 29,455 | |
| 1943 | n.a. | 1/ 31,726,434 | 468 | - | 346 | |

1/ Includes 557,725 rifles and shotguns valued at $30,950,063 exported under lend-lease. This includes parts of rifles for which quantity is not reported. The value of these parts amounted to $1,077,747.

2/ Includes small value of parts (except gun barrels) for which quantity is not reported. The value of these imports amounted to $3,082 in 1937, $4,192 in 1938, and $2,393 in 1939.

Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | | | Proposed negotiating country |
|---|---|---|---|---|---|
| | Act of 1930 | | 1945 rate | | |
| | Each | plus percent ad val. | Each | plus percent ad val. | |
| Par. 365 1/ | | | | | |
| Rifles, valued: | | | | | |
| Not over $5 each | $1.50 | 45 | No change | | UNITED KINGDOM |
| Over $5, not over $10 each | 4.00 | 45 | No change | | do. |
| Over $10, not over $25 each | 6.00 | 45 | No change | | do. |
| Over $25, not over $50 each | 10.00 | 45 | No change | | do. |
| Over $50 each | - | 65 | | 2/ 32½ | do. |
| Rifles, without locks or fittings | 10.00 | 55 | No change | | do. |
| Barrels for rifles, further advanced than rough bored | 4.00 | 50 | No change | | do. |
| Stocks for rifles | 5.00 | 50 | No change | | do. |
| Parts and fittings for rifles, n.s.p.f. | - | 55 | No change | | do. |
| Shotguns, valued: | | | | | |
| Not over $5 each | 1.50 | 45 | $0.75 | 3/ 22½ | BELGIUM |
| Over $5, not over $10 each | 4.00 | 45 | 2.00 | 3/ 22½ | do. |
| Over $10, not over $25 each | 6.00 | 45 | 3.00 | 3/ 22½ | do. |
| Over $25, not over $50 each | 10.00 | 45 | 5.00 | 3/ 22½ | do. |
| Over $50 each | - | 65 | - | 2/ 3/ 32½ | UNITED KINGDOM, BELGIUM |

See footnotes on following page.

RIFLES, SHOTGUNS, AND PARTS-Continued

| | United States tariff | | | | Proposed negotiating country |
|---|---|---|---|---|---|
| | Act of 1930 | | 1945 rate | | |
| | Each plus | percent ad val. | Each plus | percent ad val. | |
| Par. 365-Continued | | | | | |
| Shotguns without locks or fittings | $10.00 | 55 | $5.00 | 3/ 27½ | BELGIUM |
| Barrels for shotguns in single tubes, forged, rough bored | - | 10 | - | 3/ 5 | do. |
| Barrels for shotguns further advanced than rough bored | 4.00 | 50 | 2.00 | 3/ 25 | do. |
| Stocks for shotguns | 5.00 | 50 | 2.50 | 3/ 25 | do. |
| Parts and fittings for shotguns, n.s.p.f. | - | 55 | - | 3/ 27½ | do. |

1/ Paragraph does not cover muzzle-loading shotguns and rifles, which are duty-free under paragraph 1723.

2/ Trade agreement with United Kingdom, effective January 1939.

3/ Trade agreement with Belgium, effective May 1935.

Note.- The ad valorem equivalents of the duties are shown in the table at the end of this digest.

## Comment

Repeating and single-shot models of rifles are produced in the United States. Both military and sporting types are made, the sporting arms predominating in peacetime years. About 46 percent of the rifles manufactured in 1937 and nearly 58 percent in 1939 were repeating. The three main types of shotguns are single or double barreled, repeating, and auto-loading. Both single and double barrel types are produced, the single barrel (repeating and single shot) predominating.

An insignificant number of rifles have been imported. They have been largely special hand-made types of high value, used mostly for target practice or for very large game. Imports of shotguns have been greatest in the value bracket between $10 and $25. They consisted largely of an American-patented automatic gun made under contract by a Belgian concern. A substantial number of shotgun barrels (both rough bored and further advanced than rough bored) were imported before the war.

Prewar exports of rifles and shotguns (taken together) exceeded imports. Rifle exports, somewhat greater than exports of shotguns, included several thousand military models exported particularly to the Philippine Islands.

Rifles and shotguns and parts: United States imports for consumption, ad valorem equivalent of the duties, and principal sources, 1939

| Kind | Value | Ad valorem equivalent of the duty | Principal sources |
|---|---|---|---|
| | | Percent | |
| Rifles, valued: | | | |
| Not over $5 each | $21 | 81 | China, $16 |
| Over $5, not over $10 each | 20 | 85 | Canada, $20 |
| Over $10, not over $25 each | 40 | 75 | Canada, $20; UNITED KINGDOM, $20 |
| Over $25, not over $50 each | 350 | 74 | Germany 1/ $213; UNITED KINGDOM, $137 |
| Over $50 each | 1,511 | 48 | Germany 1/ $720; UNITED KINGDOM, $689 |
| Rifles without locks or fittings | - | - | |
| Barrels further advanced than rough bored | - | - | |
| Stocks for rifles | - | - | |
| Parts and fittings for rifles, n.s.p.f. | 104 | 55 | Germany, 1/ $70 |
| Shotguns, valued: | | | |
| Not over $5 each | 9 | 39 | United Kingdom, $9 |
| Over $5, not over $10 each | 6 | 56 | United Kingdom, $6 |
| Over $10, not over $25 each | 336,498 | 39 | BELGIUM, $335,498 |
| Over $25, not over $50 | 5,392 | 35 | BELGIUM, $5,204 |
| Over $50 each | 44,915 | 34 | BELGIUM, $15,515; UNITED KINGDOM $26,311 |
| Breech-loading shotguns without locks or fittings | 4 | 153 | France, $4 |
| Barrels for shotguns in single tubes, forged, rough bored | 10,023 | 5 | BELGIUM, $10,023 |
| Barrels for shotguns further advanced than rough bored | 11,889 | 53 | BELGIUM, $10,366 |
| Stocks for shotguns | 118 | 135 | BELGIUM, $118 |
| Parts and fittings for shotguns, n.s.p.f. | 2,289 | 28 | BELGIUM, $1,989 |

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

## COMBINATION SHOTGUNS AND RIFLES

Stat. import classes (1939): 947.41, 947.43, 947.45, 947.47, 947.49

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | BELGIUM | Germany 1/ | Sweden |
| | Quantity (number) | | | | | | |
| 1937 | Not | Not | 18 | 1 | N | 1 | 12 |
| 1938 | avail- | avail- | - | - | O | - | - |
| 1939 | able 2/ | able 2/ | - | - | N | - | - |
| 1943 | | | 3/ 2 | - | E | - | - |
| | Value (dollars) | | | | | | |
| 1937 | Not | Not | 509 | 202 | N | 155 | 135 |
| 1938 | avail- | avail- | - | - | O | - | - |
| 1939 | able 2/ | able 2/ | - | - | N | - | - |
| 1943 | | | 3/ 10 | - | E | - | - |

1/ Includes Austria beginning 1938.
2/ Production very small and exports negligible. (See text)
3/ Imported from Italian East Africa.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 365 | | | |
| Combination shotguns and rifles: | | | |
| Valued each: | | | |
| Not over $5 | $1.50 + 45% ad val. | $1.50 + 45% ad val. | BELGIUM |
| Over $5, not over $10 | 4.00 + 45% ad val. | 4.00 + 45% ad val. | UNITED KINGDOM, BELGIUM |
| Over $10, not over $25 | 6.00 + 45% ad val. | 6.00 + 45% ad val. | do. |
| Over $25, not over $50 | 10.00 + 45% ad val. | 10.00 + 45% ad val. | do. |
| Over $50 | 65% ad val. | 65% ad val. | do. |

Note.- Ad valorem equivalents of the duties are shown in the table at the end of this digest.

COMBINATION SHOTGUNS AND RIFLES--Continued

Hand-made combination shotguns and rifles--largely over- and under-barrel types--with foreign values of over $25 each, and light, inexpensive guns of similar design, are considered herein. The higher value models are luxury items and the lower priced guns are used for special target shooting. Other types of sporting fire arms are discussed elsewhere.

United States production and export data are not available. Only one type of gun in this class is made commercially in the United States. Some of these hand-made guns are made by custom gunsmiths in the United States and their output most likely has exceeded imports. Exports, if any, have probably been limited to shipments to American citizens living abroad or to foreign sportsmen who may have heard about the products of one of these individual gunsmiths. Imports have been limited to American citizens living abroad or to foreign sportsmen who may have heard about the products of one of these individual gunsmiths. Imports have been negligible compared with the output of United States factory-made fire arms.

Combination shotguns and rifles: United States imports for consumption, total for 5-year period, 1/ 1936-40

| Kind | Quantity | Value | Equivalents ad valorem of the duties | Principal sources |
|---|---|---|---|---|
| | Number | | Percent | |
| Combination shotguns and rifles: | | | | |
| Valued each: | | | | |
| Not more than $5 | 4 | 17 | 80 | Mexico, $17 |
| Over $5, not over $10 | - | - | 2/ - | |
| Over $10, not over $25 | 13 | 155 | 95 | Sweden, $135; Union of S. Africa, $20 |
| Over $25, not over $50 | 8 | 279 | 74 | Austria, 3/ $279 |
| Over $50 | 8 | 855 | 65 | Austria, 3/ $320; Germany, 4/ $333; UNITED KINGDOM, $202 |

1/ Totals for the 5-year period given in order to present data in more than one or two price brackets.

2/ In the second bracket the minimum ad valorem equivalent is 85 percent, with 125 percent as the upper limit.

3/ Imported during 1936.

4/ Includes Austria beginning 1938.

Source: Official statistics of the U. S. Department of Commerce.

# PISTOLS, REVOLVERS, AND PARTS

Stat. import classes (1939): 947.00, 947.01, 947.02, 947.03

United States production, exports, and imports, 1937-39 and 1943 1/

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | France | Germany 2/ | UNITED KINGDOM |
| | Quantity (number) | | | | | |
| 1937 | 139,293 | 45,225 | 511 | 2 | - | 490 |
| 1938 | n.a. | 58,869 | 157 | 46 | 18 | 84 |
| 1939 | 90,447 | 16,857 | 126 | 90 | 12 | 7 |
| 1943 | n.a. | 3/ 226,478 | 58 | - | 1 | 51 |
| | Value (dollars) | | | | | |
| 1937 | 2,521,676 | 863,952 | 4,635 | 6 | - | 4,497 |
| 1938 | n.a. | 1,242,094 | 771 | 160 | 180 | 411 |
| 1939 | 1,584,864 | 323,630 | 815 | 279 | 388 | 20 |
| 1943 | n.a. | 3/ 5,348,171 | 315 | - | 5 | 208 |

1/ Data covering production, imports, and exports of pistol and revolver parts have not been included. Production data are not available but the 1943 exports indicate there was a large output for military purposes. Imports have been negligible. There were substantial exports during war years for military purposes: for example, United States exports of parts in 1943 were $284,367 ($235,668 lend-lease). 2/ Includes Austria beginning 1938.

3/ Includes 214,525 valued at $5,105,257 exported under lend-lease.

Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 366 | | | |
| Pistols and revolvers: Automatic, single shot, or revolving: | | | |
| Valued not over $4 each | $2.00 each + 55% ad val. | No change | UNITED KINGDOM |
| Valued over $4, not over $8 each | $2.50 each + 55% ad val. | No change | UNITED KINGDOM |
| Valued over $8 each | $3.50 each + 55% ad val. | No change | UNITED KINGDOM |
| Parts thereof and fittings therefor | 105 percent ad val. | No change | UNITED KINGDOM |

## Comment

Single-shot pistols, automatic pistols, and revolvers constitute the three principal types of hand firearms. Pistols and revolvers, essential articles for military purposes, are limited in usage during peacetimes to the requirements of police officers, householders and individuals for protection and defense, and to sportsmen (largely for target shooting). The general sale and use of pistols and revolvers in the United States is restricted by legislation, and the total sales to civilians are small.

PISTOLS, REVOLVERS, AND PARTS-Continued

The sale of foreign pistols and revolvers in the United States is handicapped not only by the high duties but also by the excellent quality and reputation of the domestic products. Imports, 1936 through 1942, amounted to 500 units or less annually, largely from the United Kingdom. Many of the imported arms are high-priced, single-shot target pistols.

American pistols and revolvers have enjoyed good sales in world markets and have been adopted as standard models for use by military and police forces of a number of countries. Exports of hand firearms are many times imports.

Pistols and revolvers: United States imports for consumption, equivalent ad valorem of the duties and principal sources, 1937

| Kind | Quantity | Value | Equivalent ad valorem | Principal sources |
|---|---|---|---|---|
| | Number | | Percent | |
| Pistols, and revolvers, automatic, single-shot, magazine, or revolving: | | | | |
| Valued not over $4 each | 142 | $410 | 124 | UNITED KINGDOM, 129 - $381 |
| Valued over $4, not over $8 each | 160 | 1,022 | 94 | UNITED KINGDOM, 157 - $1,004 |
| Valued over $8 each | 209 | 3,203 | 78 | UNITED KINGDOM, 204 - $3,112 |
| Parts and fittings for | - | 136 | 105 | Germany, $136 |

Source: Official statistics of the U. S. Department of Commerce.

135

# MARINE CHRONOMETERS AND PARTS

Stat. import classes (1939): 954.33, 954.43, 955.85, 955.90

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Switzerland | Brazil |
| | Quantity (number) 1/ | | | | | |
| 1937 --- | Not | n.a. | n.a. | | | |
| 1938 --- | avail- | n.a. | n.a. | | | |
| 1939 --- | able | n.a. | 47 | 43 | 3 | - |
| 1943 --- | (see text) | 2/ 6,213 | 3/ 498 | 221 | 85 | 53 |
| | Value (dollars) | | | | | |
| 1937 --- | Not | n.a. | n.a. | n.a. | n.a. | n.a. |
| 1938 --- | avail- | n.a. | n.a. | n.a. | n.a. | n.a. |
| 1939 --- | able | n.a. | 4/ 11,967 | 6,105 | 5,748 | - |
| 1943 --- | (see text) | 2/ 186,870 | 3/ 190,751 | 88,759 | 35,455 | 25,125 |

1/ Marine chronometers only.
2/ Includes 5,755, valued at $154, 491, exported under lend-lease.
3/ Free for Government use, 436, valued at $177,435, and free as an act of international courtesy, 2, valued at $400.
4/ Includes parts, valued at $5,266, of which $5,176 were from Switzerland and $26 from the United Kingdom.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate 1/ | |
| Par. 368: | | | |
| (a) Clocks, clock movements, * * * and any mechanism, device, or instrument intended or suitable for measuring time, * * * whether or not in cases, containers, or housings: | | | |
| Valued more than $10 each: | | | |
| Standard marine chronometers having spring detent escapements | $4.50 + 65% ad val. | $2.25 + 32½% ad val. | UNITED KINGDOM |
| Jewels contained in foregoing | .25 ea. | .12½ ea. | do. |
| (c)(1) Parts for (except plates or jewels) imported with complete movements (not exceeding in value 1½ percent of value of such mechanisms) 2/ | 45% ad val. | 22½% ad val. | do. |
| (c)(6) Parts for (except jewels), n.s.p.f. 3/ | 65% ad val. | 32½% ad val. | do. |

1/ Trade agreement with the United Kingdom, effective January 1939.
2/ Value of parts in excess of 1½ percent of value of complete mechanisms dutiable at rate provided for parts, n.s.p.f. in clause (c) (6).
3/ Does not include plates and assemblies or subassemblies.

MARINE CHRONOMETERS AND PARTS--Continued

Comment

Standard marine chronometers are clocks constructed to operate with a very high degree of precision, being equipped with a special type of escapement found in no other type of timepiece. Virtually all of them are used aboard ships, principally for determining the longitude of the ship's position.

At one time several domestic firms manufactured chronometers, but in the years immediately before the war the United States had ceased to be a producer, and during the war one American watch manufacturer produced chronometers of great accuracy and supplied a considerable part of the demands of the Navy and the Merchant Marine. Such production, however, is not expected to continue.

Virtually all United States imports of complete chronometers have been from the United Kingdom. Some parts have been imported from Switzerland.

Exports from the United States of this class of instrument have been nil except on lend-lease.

In peacetime these instruments, which must be maintained constantly to a high degree of accuracy, have a long life. From available information, it seems likely that the United States Navy and the Merchant Marine have acquired a sufficient number to supply their needs for some years. Probably the number of new chronometers required as replacements will be small or even nil for a number of years. American manufacture has been stopped, since quantity production is essential in the United States in order to compete with the foreign made chronometers, and the market is never large.

Marine chronometers and parts: United States imports for consumption, equivalent ad valorem of the duties, and principal sources, 1939

| Kind | Quantity | Value | Equivalent ad valorem: | Principal sources |
|---|---|---|---|---|
| | Number | | Percent | |
| Marine chronometers: Valued more than $10 | 47 | $6,701 | | |
| Jewels contained in | 433 | - | 34.9 | United Kingdom, $6,079 |
| Parts (except plates or jewels) imported with complete movements | - | 64 | 22.5 | France, $64 |
| Parts for (except jewels), n.s.p.f. | - | 5,202 | 32.5 | Switzerland, $5,176 |

Source: Official statistics of the U. S. Department of Commerce.

## SHIPS' LOGS, DEPTH SOUNDERS, AND PARTS

Stat. import classes (1939): 959.023; 959.033; 959.072; 959.076

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | | |
| | Quantity (number) | | | | | |
| 1937 | Not available 1/ | Not available 2/ | n.a. | | | |
| 1938 | | | n.a. | | | |
| 1939 | | | 100 | 96 | | |
| 1943 | | | 49 | 49 | | |
| | Value (dollars) | | | | | |
| 1937 | Not available 1/ | Not available 2/ | n.a. | | | |
| 1938 | | | n.a. | | | |
| 1939 | | | 3/ 24,937 | 19,457 | | |
| 1943 | | | 4/ 2,702 | 2,646 | | |

1/ Much greater than imports.
2/ Small.
3/ Includes parts valued at $3,009 of which $2,769 were imported from the United Kingdom.
4/ Includes parts valued at $303 of which $247 imported from the United Kingdom.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate 1/ | |
| Par. 368 | | | |
| (a) Clocks, clock movements, * * * and any mechanism, device, or instrument intended or suitable for measuring time, distance, speed, * * whether or not in cases, containers or housings: | | | |
| Ships' logs and depth-sounding mechanisms, devices, and instruments valued at more than $10 each | $4.50 each + 65% ad val. | $2.25 each + 32½% ad val. | UNITED KINGDOM |
| Jewels contained in the foregoing | $0.25 each | $0.12½ each | do. |
| (c)(1) Parts (except plates and jewels) imported with complete mechanisms (not exceeding in value 1½ percent of value of such mechanisms) 2/ | 45% ad val. | 22½% ad val. | do. |
| (c)(6) Parts for (except jewels) n.s.p.f. 3/ | 65% ad val. | 32½% ad val. | do. |

1/ Trade agreement with the United Kingdom, effective January 1939.
2/ Value of parts in excess of 1½ percent of value of complete mechanisms dutiable at rate provided for parts, n.s.p.f.
3/ Does not include plates and assemblies or subassemblies.

SHIPS' LOGS, DEPTH SOUNDERS, AND PARTS--Continued

Comment

Ships' logs are distance speed indicators. There are three types: taffrail logs, which are towed overside and transmit the distance traveled through a line to the indicating mechanism on deck; under-water logs, which are attached to the hull and operate by means of impellers or pressure tubes; and tachometers, which indicate the speed of rotation of the ship's propeller shaft.

Depth-sounding apparatus is of three types, all of which measure and indicate depth. One operates by means of a pressure tube sunk to the bottom, another by the action of a sinking impeller, and a third on the echo principle.

The use of taffrail logs is diminishing, and that of underwater or tube types of logs has not been extensive. Use of the tachometer types has been increasing. All three types of depth sounders continue to be used, but there is an increasing tendency to install the echo-type apparatus as it provides more accurate readings at high speeds.

United States production data are not available. According to trade information, seven concerns manufacture ships' logs and three, depth sounders. Taffrail logs suitable for seagoing vessels have not been made in the United States, but have been imported from England; a smaller type for yachts is made in the United States and not imported. Some instrument manufacturers are equipped to produce marine types of tachometers. Most of the concerns are small but some are fairly large and the larger ones produce other marine equipment.

Imports were unimportant in the decade before the war and did not increase materially during the war. The United Kingdom is the principal source of imports except for tachometer types of marine speed indicators, which are also produced in Switzerland.

A fairly large supply of this equipment is now on hand in the United States, and there will probably be only a sporadic demand for new equipment for some years, particularly for depth sounders. It seems likely that replacement for both the speed and depth indicators will be of the more modern types, in the manufacture of which the United States excels.

Ships' logs and depth sounders and parts: United States imports for consumption, ad valorem equivalent of the duties, and principal sources, 1939

| Kind | Quantity | Total value | Ad valorem equivalent | Principal sources |
|---|---|---|---|---|
| | Number | | Percent | |
| Ships' logs and depth sounders, valued more than $10 each | 100 | $21,928 | 24 | UNITED KINGDOM, 96 valued at $16,688 |
| Jewels contained in | - | - | - | |
| Parts for (except plates and jewels) imported with complete movements | - | - | - | |
| Parts for (except jewels), n.s.p.f. | - | 3,009 | 32 | UNITED KINGDOM, $2,769 |

Source: Official statistics of the U. S. Department of Commerce.

# ASSEMBLIES AND SUBASSEMBLIES FOR CLOCKS AND CLOCKWORK MECHANISMS

Stat. import classes (1939): 955.83-.84; 959.068; 959.070

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from— | | | |
|---|---|---|---|---|---|---|
| | | | All countries | Germany 1/ | Canada | UNITED KINGDOM |
| | Quantity (number) | | | | | |
| 1937 | Not available 2/ | Not available 3/ | 11,001 | 1,872 | 800 | 7,725 |
| 1938 | | | 96,055 | 75,294 | 1,360 | 19,166 |
| 1939 | | | 29,664 | 25,482 | 3,042 | 66 |
| 1943 | | | 1,618 | - | 1,018 | - |
| | Value (dollars) | | | | | |
| 1937 | Not available 2/ | Not available 3/ | 3,014 | 29 | 252 | 2,437 |
| 1938 | | | 13,406 | 8,918 | 767 | 3,689 |
| 1939 | | | 4,195 | 2,848 | 1,054 | 38 |
| 1943 | | | 1,117 | - | 939 | - |

1/ Includes Austria beginning 1938.
2/ Greatly exceeds imports. 3/ Probably exceed imports.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 368(c)(3) | | | |
| Parts of clocks, clock movements, and clock work mechanisms: | | | |
| Assemblies or subassemblies consisting of two or more parts or pieces joined or fastened together (except plates or jewels) 1/ ----- | 3¢ for ea. part or piece +65% ad val. | 3¢ for ea. part or piece +65% ad val. | UNITED KINGDOM |
| Jewels in assemblies or subassemblies ---------- | $0.25 ea. in addition | $0.25 ea. in addition | do. |

1/ No assembly or subassembly shall be subject to a greater amount of duty than the complete mechanism, etc., for which suitable. Bimetallic balance wheels, and main springs with riveted ends, shall each be considered as one part or piece.

## Comment

This discussion deals with parts for clocks and clockwork mechanisms which have been assembled, except those assemblies or subassemblies which have been joined or fastened to a plate or plates.

United States manufacturers of clocks and instruments have been large producers of timekeeping, time-measuring, and time-indicating mechanisms, devices, or instruments. While separate data are not available for the output of the assembled parts of the types herein considered, the value of the production of all movements and parts of clocks and clockwork mechanisms made for sale separately (i.e., not as finished instruments) in 1939 was nearly 1 million dollars.

ASSEMBLIES AND SUBASSEMBLIES FOR CLOCKS AND CLOCKWORK MECHANISMS-Continued

Assembled parts for clockwork mechanisms predominate in the imports of these categories, having accounted for 90 and 98 percent of the total value of imports in 1938 and 1939 respectively. The chief sources were Germany and the United Kingdom.

Clock and clockwork mechanism assemblies and subassemblies: United States imports for consumption, equivalent ad valorem of the duties, and principal sources, 1938

| Kind | Quantity | Value | Equivalent ad valorem | Principal sources |
|---|---|---|---|---|
| | Number | | Percent | |
| Assemblies or subassemblies for clocks and clock movements | 10,891 | 1,360 | 89 | UNITED KINGDOM, $1,329 |
| Jewels contained in | - | - | | |
| Assemblies or subassemblies for clockwork mechanisms | 85,164 | 12,046 | 86 | Germany 1/, $8,887; UNITED KINGDOM, $2,360 |
| Jewels contained in | 36 | - | | |

1/ Includes Austria.
Source: Official statistics of the U. S. Department of Commerce.

Statistics as to the exports of these assembled parts are not available but since exports of the clocks and clockwork mechanisms are fairly large it seems probable that exports of the assemblies, which would be needed for replacements or repairs, have much exceeded the imports.

Par. No. 368(e)
BELGIUM

CLOCK CASES

Stat. import class (1939): 955,98

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from--- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Germany 1/ | France | BELGIUM | Japan |
| | Quantity (number) | | | | | | |
| 1937 | Not available 2/ | Small | 15,971 | 711 | 871 | 1,953 | 11,299 |
| 1938 | | | 3,427 | 949 | 77 | 444 | 272 |
| 1939 | | | 3,734 | 881 | 404 | 266 | 1,888 |
| 1943 | | | - | - | - | - | - |
| | Value (dollars) | | | | | | |
| 1937 | Not available 2/ | Small | 8,640 | 749 | 1,975 | 4,494 | 917 |
| 1938 | | | 4,436 | 1,808 | 201 | 1,000 | 51 |
| 1939 | | | 3,350 | 1,412 | 896 | 617 | 223 |
| 1943 | | | - | - | - | - | - |

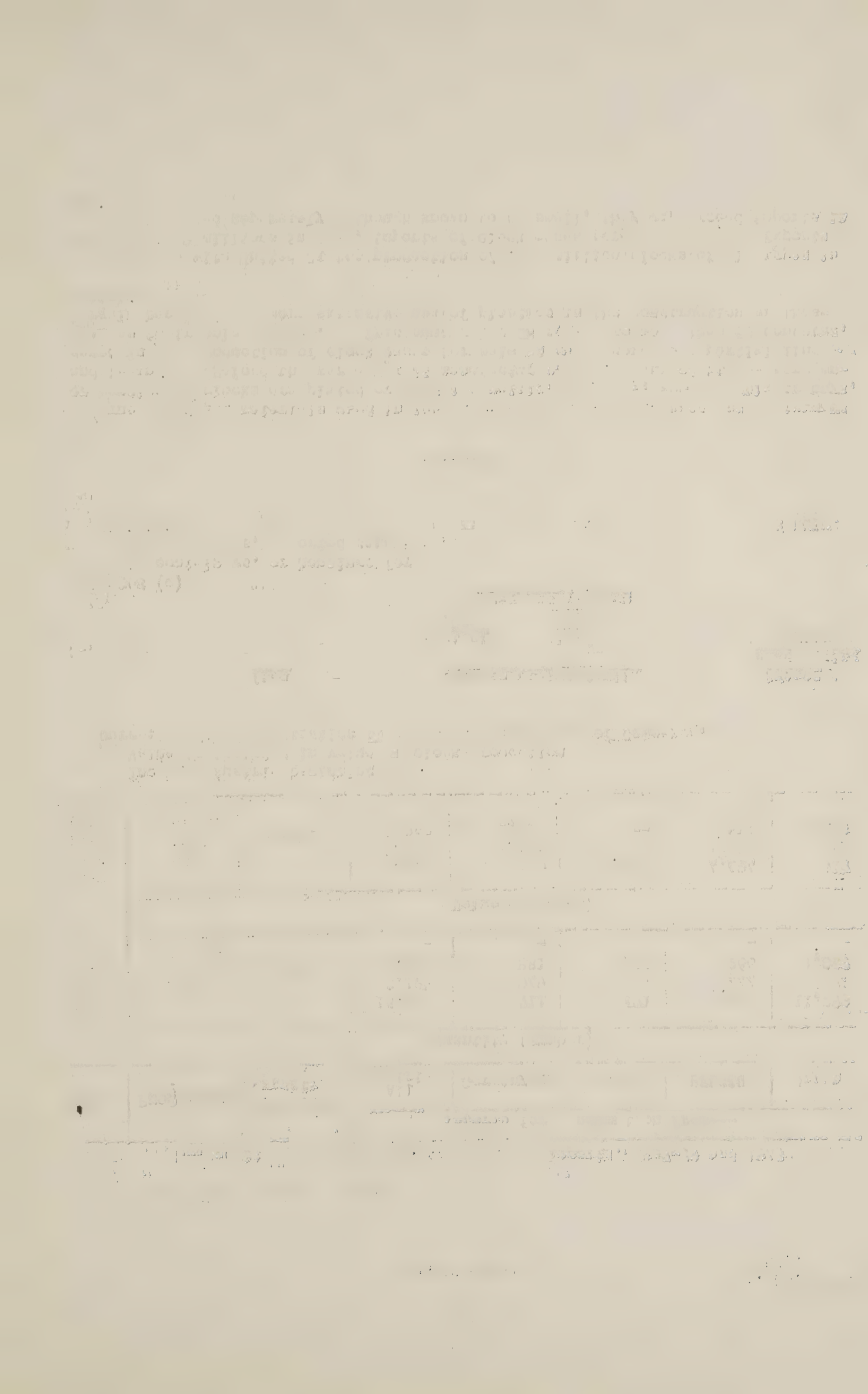
1/ Includes Austria beginning 1938.
2/ Value is included in value of clock production
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 368 (e) | | | |
| Cases, containers, or housings for clock movements, imported separately, n.s.p.f. | 45 | 45 | BELGIUM |

Comment

The principal materials used in the construction of clock cases and containers or housing of clocks are plated or unplated metals, plastics, wood, marble or onyx, and leather. Before the war about 25 manufacturers in the United States were engaged in the production of clock cases for sale as such, more as a partial line than as their sole product. This number has increased to more than 50 concerns, largely because of a more extensive use of plastics in the construction of these articles.

Compared with United States production of 16.4 million clocks of all types in 1937 and 15.9 millions in 1939, imports of clock cases were negligible. Exports are not reported separately; although known to be small, they may exceed imports in value.



TAXIMETERS AND PARTS

Par. No. 368(g)
UNITED KINGDOM

Stat. import classes (1939): 959.066, 959.074

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from--- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Canada | |
| | Quantity (number) | | | | | |
| 1937 | Not available (See text) | Not available | 26 | - | 20 | |
| 1938 | | | 1 | - | 1 | |
| 1939 | | | 1 | 1 | - | |
| 1943 | | | - | - | - | |
| | Value (dollars) | | | | | |
| 1937 | Not available | Not available | 830 | - | 620 | |
| 1938 | | | 1/ 51 | - | 30 | |
| 1939 | | | 35 | 35 | - | |
| 1943 | | | - | - | - | |

1/ Includes parts valued at $21; imported from Germany (including Austria).
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 368(g) | | | |
| Taximeters and parts thereof | 85 | 85 | UNITED KINGDOM |

Comment

Taximeters are used in public conveyances, usually taxicabs, to indicate the fare. In recent years there has been a diminishing demand due to the increasing use of zone fares.

United States production and export data are not available, but it is known that domestic output, is large and exports are probably considerable. Four concerns in the United States produce these registers. Imports in the late 1930's, were negligible. For the 5-year period 1931-35 annual imports were only slightly more averaging 35 taximeters with a value of $920, and parts valued at $171.

MOTOR VEHICLES AND PARTS, EXCEPT INNER TUBES

Stat. import classes (1939): 7900.1-5; 7900.7-8; 7902.0-1; 7902.4-5; 7902.9

United States production, exports, and imports, 1937-39 and 1943

| Year | Production 1/ | Domestic exports | Imports for consumption from-- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | Germany 2/ | UNITED KINGDOM | CANADA | France |
| | Quantity (number 3/) | | | | | | |
| 1937 - | 4,733,000 | 395,000 | 1,444 | 26 | 478 | 38 | 26 |
| 1938 - | 4/ 2,400,000 | 277,000 | 188 | 19 | 45 | 12 | 43 |
| 1939 - | 3,525,000 | 253,000 | 301 | 17 | 106 | 19 | 141 |
| 1943 - | 5/ 676,000 | 79,000 | 133 | - | - | 133 | - |
| | Value (1,000 dollars) | | | | | | |
| 1937 - | 2,848,786 | 345,816 | 6/ 1,591 | 350 | 667 | 130 | 17 |
| 1938 - | n.a. | 267,638 | 1,748 | 1,307 | 147 | 124 | 33 |
| 1939 - | 2,275,254 | 7/ 252,929 | 8/ 1,446 | 872 | 268 | 119 | 93 |
| 1943 - | n.a. | 7/ 273,434 | 8/ 1,262 | - | 72 | 1,186 | 1 |

1/ Motor vehicles and chassis only. In addition to the values given, motor vehicle bodies and parts valued at 2,117 thousand dollars in 1937 and 1,472,566 thousand dollars in 1939 were produced. A large but unknown part of these bodies and parts were for assembly in complete motor vehicles, so the combined total would include considerable duplication.

2/ Includes Austria beginning 1938.

3/ Exports represent number of new motor vehicles only; imports exclude number of used automobiles (other than trucks and busses).

4/ Factory sales.

5/ All trucks and truck tractors.

6/ Includes imports valued at 297 thousand dollars from Italy.

7/ Includes vehicles and parts valued at 177,934 thousand dollars exported under lend-lease.

8/ Free for Government use.

Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 369(a) | | | |
| Automobile trucks valued at $1,000 or more each, automobile trucks and motor bus chassis valued at $750 or more each, and automobile truck bodies valued at $250 or more each, motor busses designed for the carriage of more than 10 persons, and bodies for such busses--all the foregoing whether finished or unfinished | 25 | 25 | UNITED KINGDOM, CANADA |
| Par. 369(b) | | | |
| All other automobiles, automobile chassis, and automobile bodies--all the foregoing whether finished or unfinished | 10 | 10 | do. |
| Par. 369(c) | | | |
| Parts (except tires and inner tubes, and except parts wholly or in chief value of glass), for any of the articles enumerated above, finished or unfinished, not specially provided for | 25 | 25 | do. |

MOTOR VEHICLES AND PARTS, EXCEPT INNER TUBES-Continued

Comment

The automobile industry is among the first in size in the United States. About 30 manufacturers build cars and trucks; they produce a part of their components, but buy so many others from specialty manufacturers that the supply of parts is itself a leading industry, occupying over 1,000 firms. The large population and high income in the United States offers so extensive a market that domestic automobile manufacturers have been able to lower production costs by heavy investments in labor-saving equipment, deriving their profit from a volume of sales which has made the ratio of cars to population in the United States much the highest in the world. In the immediate prewar years the United States produced about 75 percent of the world's output of motor vehicles. Great Britain, the second largest producer, supplied from 8 to 11 percent. The proportion of world production in the United States was declining somewhat, as foreign production increased.

American automobiles are exported to all parts of the world. In the last three prewar years United States exports to the United Kingdom averaged 11 million dollars annually; to Canada, over 40 million; and to other British countries, over 50 million. Exports to France, a leading European producer, were nearly 8 million dollars annually. United States exports have declined, however, and the proportion of United States made vehicles in all foreign countries to the total registered fell from about 50 percent in 1929 to 38 percent in 1939.

For many years imports of motor vehicles have been trifling in relation to the domestic production. In recent prewar years they consisted mainly of three classes: (a) A few high-priced cars, mainly from Great Britain; (b) a few hundred low-priced cars from Great Britain and Italy; and (c) parts for trucks, which were imported by the Ford Motor Co. from affiliated German firms and used in cars to be exported from the United States with drawback of duty on the parts. This practice was due mainly to German control of exchange. Imports from Canada consisted largely of used cars, probably of United States manufacture, and parts valued at a few thousand dollars.

Motor vehicles and parts: United States imports for consumption, by kind, with principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Trucks and motor busses: | | |
| Trucks $1,000 or more each | - | |
| Trucks and bus chassis $750 or more each | $900 | CANADA, $900. |
| Truck bodies $250 or more each | 1,300 | CANADA, $1,300. |
| Motor busses and bodies | - | |
| Automobiles other than trucks and busses: | | |
| New, complete or chassis | 376,960 | UNITED KINGDOM, $232,542; France, $83,131; Germany, 1/ $28,199; Italy, $13,366. |
| Used, complete or chassis | 139,684 | CANADA, $64,905; Mexico, $32,764; UNITED KINGDOM, $18,998. |
| Other, bodies | 1,335 | France, $786; Australia, $320; Germany, 1/ $249. |

MOTOR VEHICLES AND PARTS, EXCEPT INNER TUBES-Continued

Motor vehicles and parts: United States imports for consumption, by kind, with principal sources, 1939-Continued

| Kind | Total value | Principal sources |
|---|---|---|
| Automobile parts: | | |
| Engines | 3,383 | Italy, $1,954; Germany, 1/ $1,300. |
| Generators | 16,628 | Germany, 1/ $16,217. |
| Starting motors | 9 | CANADA, $9. |
| Spark plugs | 4,959 | Germany, 1/ $3,268; UNITED KINGDOM, $1,676. |
| Other parts | 900,897 | Germany, 1/ $816,683; CANADA, $39,186; Switzerland, $18,705; UNITED KINGDOM, $15,041 |

1/ Includes Austria.
Source: Official statistics of the U. S. Department of Commerce.

Stat. classes (1939): 794.10, 794.11

United States production, exports, and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | Germany 1/ | CANADA |
| | Quantity (number 2/) | | | | | |
| 1937 | 18,000 | 3,291 | 346 | 204 | 131 | 4 |
| 1938 | n.a. | 3,374 | 256 | 120 | 124 | 3 |
| 1939 | n.a. | 3,064 | 360 | 214 | 117 | 20 |
| 1943 | n.a. | 3/ 27,278 | 4/ 52 | 7 | 6 | 14 |
| | Value (dollars) | | | | | |
| 1937 | 7,030,816 | 1,238,755 | 70,301 | 42,657 | 25,444 | 764 |
| 1938 | n.a. | 1,251,525 | 69,917 | 39,582 | 27,764 | 712 |
| 1939 | n.a. | 1,165,602 | 95,148 | 68,994 | 18,163 | 6,983 |
| 1943 | n.a. | 3/ 4,304,872 | 4/ 9,313 | 2,109 | 990 | 3,366 |

1/ Includes Austria beginning 1938.
2/ Excludes parts.
3/ Includes 22,711 valued at $11,674,525 exported under lend-lease.
4/ Includes 23 cycles valued at $2,728 imported from Mexico.
Source: Official statistics of the U. S. Department of Commerce.

| | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | (Percent ad valorem) | | |
| Par. 369 | | | |
| (b) Motorcycles, finished or unfinished | 10 | 1/ 10 | UNITED KINGDOM, CANADA |
| (c) Motorcycle parts, except tires and except parts wholly or in chief value of class | 25 | 2/ 15 | UNITED KINGDOM, CANADA |

1/ Rate bound in trade agreement with United Kingdom, effective January 1939.
2/ Trade agreement with UNITED KINGDOM; reduced rate was not applicable to imports from Germany.

## Comment

It is estimated by the trade that about 60 percent of the motorcycles in the United States are used for sport or pleasure, 20 percent by police, and 20 percent for commercial purposes. There are two domestic manufacturers of standard motorcycles; several others make light, low-powered machines not comparable with either domestic or imported standard-sized motorcycles. The capacity of the United States industry is over 50,000 standard machines annually. Prewar production varied with the popularity of motorcycling, and ranged from nearly 60,000 in 1919 to 7,000 in 1932. In 1942 capacity production was maintained, with a large production of additional parts, all for military uses. As the demand lessened later in the war, the manufacturers turned to other war products. Production is now limited by the scarcity of materials.

Motorcycles are more widely used in Europe than in the United States, because of the lower incomes and the higher taxes on automobiles and motor fuel. Before the war more than 300,000 motorcycles were registered in the United Kingdom.

MOTORCYCLES AND PARTS--Continued

This was about three times the number registered in the United States, but British registration declined rapidly during the war, and at its close was about equal to that in the United States.

In 1937 British production was estimated at over 80,000 units, while that of the United States was 18,000. Prewar British exports ranged from about 20,000 to 25,000 annually, of which half to two-thirds went to British countries. United States exports were about 3,000 annually. Germany was also a large producer, although many of the German machines were of the small "motorized bike" type. It is reported that the allowable quota for German production of standard motorcycles is to be 10,000 annually, to be reached by 1949, while production of the small type is to be unlimited.

Most American motorcycles range from 45 to 74 cubic inches in cylinder capacity, weigh 500 pounds or more, and have two cylinders. British machines range from about 20 to 30 cubic inches, weigh under 400 pounds, and have one or two cylinders. They have less speed and their ability to carry passengers is less than for American motorcycles.

During the war a backlog of civilian demand was built up in the United States, which cannot be quickly satisfied. United States imports, which before the war ranged from about 200 to 300 yearly, jumped to 6,355, valued at $1,556,000, in the first 9 months of 1946. Practically all of them came from the United Kingdom. Prices to dealers and retail prices of domestic and British motorcycles of the stnadard type in the United States market are quite similar, and notwithstanding the smaller size of the imported machines, prices are sometimes higher. There are also substantial imports of still smaller British machines, more nearly comparable with the small, light-weight American models. Domestic manufacturers of the standard machines, aware that the lightness and economical operation of the British motorcycles appeal to some riders, have under consideration the production of lighter-weight models of the standard type.

Although motorcycles and automobiles are dutiable under the same paragraph, and at the same rate (10 percent), the American motorcycle industry is in a very different position from that of the automobile industry. The limited United States motorcycle market does not allow mass production comparable to that in the automobile industry, and British manufacturers have the advantage of lower labor rates and a larger home and export market.

Motorcycles and parts: United States imports for consumption by principal sources with the ad valorem equivalent of the duty, 1939

| | Total Value | Principal sources | Ad valorem equivalent |
|---|---|---|---|
| | | | Percent |
| Motorcycles | $79,146 | UNITED KINGDOM, $55,938; Germany,1/ $15,997; CANADA, $6,283 | 10 |
| Parts | 16,002 | UNITED KINGDOM, $13,056; Germany,1/ $2,166 | 2/16.4 |

1/ Includes Austria.
2/ Germany 25 percent ad valorem, other countries 15 percent ad valorem.
Source: Official statistics, U. S. Department of Commerce.

AIRCRAFT AND PARTS (EXCEPT TIRES AND INNER TUBES)
(For discussion of airplane tires and inner tubes, see digests on Bicycle Casings, etc., par. 1537 (b) and Inner Tubes, etc., par. 369(c))

Stat. import classes (1939): 7910.1, 7910.2, 7910.4, 7910.6, and 7910.8

United States production, exports, and imports, 1937-39 and 1943

| Year | Production 1/ | Domestic exports 2/ | Imports 3/ for consumption from-- | | | |
|---|---|---|---|---|---|---|
| | | | All countries | Switzerland | CANADA | UNITED KINGDOM |
| | Value (1,000 dollars) | | | | | |
| 1937 -- | 149,700 | 39,404 | 94 | 20 | 29 | 17 |
| 1938 -- | n.a. | 68,228 | 42 | 12 | 12 | 6 |
| 1939 -- | 279,497 | 117,806 | 39 | 15 | 11 | 5 |
| 1943 -- | 13,800,000 | 4/ 2,142,611 | 5/ 31,490 | - | 28,775 | 1,916 |

1/ Includes value of work done during year on aircraft under construction and value of experimental work.
2/ Aircraft, parts, and accessories, except tires.
3/ Aircraft and parts of all kinds, including tires and inner tubes.
4/ Includes aircraft valued at 1,976,923 thousand dollars exported under lend-lease.
5/ Free for Government use, 29,104 thousand dollars and free as an act of international courtesy 1,775 thousand dollars.
Source: Official statistics of the U. S. Department of Commerce.

| | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| | Percent ad valorem | | |
| Par. 370 | | | |
| Airplanes, hydroplanes, and parts of the foregoing ---------- | 30 | 30 | CANADA |

Comment

The United States aircraft industry under the stimulus of war demand, made almost incredible advances in all branches. Peak wartime production was reached in 1944 when 96,369 planes and 256,571 engines were produced and the value of aircraft products totaled $16,340,000,000. About 600 concerns employing over 2 million workers were producing aircraft products in that year. Included in this number were many automobile manufacturers and a legion of subcontractors and licensees which normally are engaged in other lines of business.

Peacetime requirements obviously will not support the abnormally high wartime level of production, imports, and exports. On the other hand, it appears certain that the industry will not revert to its prewar status. American military and transport planes have gained a world-wide reputation for speed, efficiency, and reliability. The development of planes for private flying, an important aspect of postwar business, was retarded during the emergency by concentration on military and transport types, but greater advances are now expected in this field.

In 1939 there were 125 firms in the United States (exclusive of Federal Government establishments) employing 48,638 workers engaged in the production of aircraft, both heavier-than-air and lighter-than-air, including gliders, balloons, and parachutes, and parts especially designed for aircraft, such as engines, propellers, and pontoons. In addition, numerous establishments were primarily engaged in the manufacture of aeronautical instruments and aeronautical electrical equipment.

AIRCRAFT AND PARTS (EXCEPT TIRES AND INNER TUBES)-Continued

Aircraft and parts: United States production in 1939 1/
(In million dollars)

| | Value |
|---|---|
| Military aircraft | 62 |
| Civil aircraft | 13 |
| Aircraft engines and parts | 74 |
| Propellers, propeller blades and parts, pontoons, and parachutes | 15 |
| Other aircraft parts | 37 |

1/ In addition to the items shown, work done during the year on aircraft under construction and experimental work was valued at about 79 million dollars.
Source: U. S. Census of Manufactures.
Note: The values of aircraft do not include the cost of engines, propellers, and power-plant accessories. The total value of products for the industry, however, may include some duplication due to the fact that the products of establishments engaged in the manufacture of parts are to some extent used by other establishments in the industry in the manufacture of subassemblies and complete aircraft.

In the distribution of plants California, New York, Ohio, and Pennsylvania, in 1939 led with the largest number. Other states with important production included Michigan, Connecticut, New Jersey, Kansas, Missouri, Illinois, Maryland, Indiana, Delaware, Oklahoma, Massachusetts, Tennessee, and Washington.

With few exceptions airframe companies have concentrated on this type of production, purchasing parts and components, including engines and propellers as well as instruments and equipment, from outside sources. A smaller number of manufacturers are engaged in the production of engines than in airframe production. The high-powered-engine field has been dominated by three companies, two specializing in radial air-cooled units, and one producing in-line, liquid-cooled engines. Production of low-powered engines for use in small civilian planes has been much less concentrated. There are a number of producers of propellers, but one firm has accounted for about 75 percent of domestic output.

In the prewar period there was a tendency among producers to manufacture planes for a single market, major emphasis being placed by each concern either on military, or on commercial, or on small planes for private use. The industry did not then have a market sufficiently large to warrant the employment of mass-production methods. The principal outlets for sale were the Army and Navy, air transport lines, and a limited number of corporations and private individuals.

During the war, production was confined to military requirements, as shown in the following table:

Aircraft: United States production by kind
during specified years 1939-44
Quantity (number)

| Year | Airplanes | | | Aircraft engines 2/ |
|---|---|---|---|---|
| | Civil 1/ | Military | Total | |
| 1939 | 3,715 | 2,141 | 5,856 | 3/11,172 |
| 1941 | 6,844 | 19,290 | 26,134 | 52,633 |
| 1943 | - | 85,946 | 85,946 | 226,561 |
| 1944 | - | 96,369 | 96,369 | 256,571 |

1/ Figures represent registrations and therefore differ slightly from production figures.
2/ Engines produced for ordnance and engine parts are not included herein.
3/ As reported by the Census of Manufactures.
Source: Statistical service, Aeronautical Chamber of Commerce, except as noted.

AIRCRAFT AND PARTS (EXCEPT TIRES AND INNER TUBES)-Continued

Exports for many years before the war represented about 30 percent of the total value of domestic output. In the 3 years 1938-40 as the threat of war grew, sales to foreign countries accounted for over 50 percent of total output. In the 3 years 1941-43 the United States produced 153,061 planes, including 105,126 combat planes. Approximately 28,000 of these were sent to our Allies.

Prior to the war many countries were using American-built planes and engines on their airline services, and others were using American-built engines and other equipment in airframes of their own manufacture.

Aircraft: Domestic exports, 1939 and 1943

| Item | 1939 | | 1943 | |
|---|---|---|---|---|
| | Number | Value | Number | Value |
| Planes, gliders, and lighter-than-aircraft | 1,221 | $67,111,866 | 1/ 13,897 | 1/ $1,217,037,985 |
| Engines | 1,880 | 14,120,035 | 21,803 | 243,649,570 |
| Aircraft engine parts and accessories | na | 6,853,833 | na | 2/ 166,640,649 |
| Aircraft instruments and parts | na | 2,337,902 | na | 3/ 105,631,568 |
| Propellers and parts | na | na | na | 78,552,285 |
| Bomb rack controls, deicers, struts, braces, etc. | na | na | na | 31,586,009 |
| Bomb sights | na | na | na | 26,738,156 |
| Parachutes and parts | na | 775,389 | na | 1,814,740 |
| Aircraft parts and accessories, n.e.s. | na | 26,607,187 | na | 270,960,532 |
| Total | | 117,806,212 | | 4/ 2,142,611,494 |

1/ Includes bombers, fighters, combat and light transports, communication planes, trainers, land planes, gliders, and barrage balloons.
2/ Includes carburetors, cowls, crankcases, cylinders, spark plugs, etc.
3/ Includes automatic pilots, gyros, navigation instruments, radio transmitting and receiving sets and parts, directors and range finders, self synchronous transmitters and indicators, sound locators, tachometers, and other instruments and parts.
4/ Includes Lend-Lease shipments valued at $1,976,923,172.
Source: Official statistics of the U. S. Department of Commerce.

Imports before the war were insignificant as compared with domestic output and exports and have consisted chiefly of parts other than engines. Few complete aircraft and engines were imported. Switzerland, Germany, the United Kingdom, Canada, and France were the leading sources of imports. The abnormally large imports in 1943 were the result of war requirements and were chiefly from Canada and the United Kingdom.

Aircraft: United States imports for consumption, by kinds, with principal sources, 1939 and 1943

| Kind | Total value | Principal sources |
|---|---|---|
| | 1939 | |
| Airplanes | $4,394 | CANADA, $4,394. |
| Parts of aircraft except engines | 34,440 | Switzerland, $15,469; CANADA, $7,020; United Kingdom, $4,792; Germany, $4,028; France, $2,643. |
| Total | 38,834 | Switzerland, $15,469; CANADA, $11,414. |

AIRCRAFT AND PARTS (EXCEPT TIRES AND INNER TUBES)-Continued

Aircraft: United States imports for consumption, by kinds, with principal sources, 1939 and 1943-Con.

| Kind | Total value | Principal sources |
|---|---|---|
| | 1943 | |
| Airplanes | 960,853 | CANADA, $715,353; United Kingdom, $242,500. |
| Seaplanes and amphibians | 12,020,000 | CANNADA, $12,000,000; Italy, $20,000. |
| Other aircraft | 46,828 | United Kingdom, $43,500; CANADA, $3,328. |
| Engines | 1,277,016 | United Kingdom, $394,400; CANADA, $377,800. |
| Parts (other than engines) | 17,184,960 | CANADA, $15,678,529; United Kingdom, $1,235,476. |
| Total | 31,489,657 | CANADA, $28,397,210; United Kingdom, $1,893,876. |

Source: Official statistics of the U. S. Department of Commerce.

The impact of the sudden termination of hostilities in mid-August 1945 on the aircraft industry was most drastic. In a matter of days around 90 percent of production scheduled for the remainder of 1945 was canceled. Cutbacks and terminations were encountered in all branches of the industry. But 5 months after VJ-Day, the industry was fairly well established at one-eighth of its peak wartime size. Employment in 72 major plants, representing about four-fifths of the industry's total employment, totaled 206,800.

Several factors helped to ease the transition from war to peacetime production. Government business was not completely withdrawn, and most of the aircraft companies were able to put into effect plans made in anticipation of the end of hostilities. Moreover, many companies had outstanding orders for transport and civilian planes. Many companies are now drawing into their own organizations work formerly done by subcontractors, and there is also a trend toward diversification of product.

Although in the postwar period United States exports of aircraft will naturally be much smaller than during the war years when great numbers of planes were being shipped under lend-lease, exports seem likely, especially in the longer-term postwar period, to be materially larger than before the war. The domestic industry will probably be able to a large extent to follow the pattern of the automotive industry in marketing abroad large numbers of low-cost safe and highly-efficient units produced by mass-production methods.

Par. No. 370
CANADA
UNITED KINGDOM

# MOTORBOATS (PLEASURE) AND PARTS

Stat. import classes (1939): 7925.1-7925.4; 7925.6-7925.9

United States production, exports, and imports, 1937-39 and 1943

| Year | Production 1/ | Domestic exports 2/ | All countries | CANADA | UNITED KINGDOM | Norway | Sweden |
|---|---|---|---|---|---|---|---|
| | Value (1,000 dollars) | | | | | | |
| 1937 | 15,000 | 1,836 | 139 | 25 | 25 | 49 | 18 |
| 1938 | n.a. | 1,746 | 153 | 18 | 5 | 36 | 64 |
| 1939 | 13,000 | 1,809 | 145 | 59 | 13 | 28 | 20 |
| 1943 | n.a. | 3/1,271 | 20 | 16 | 1 | - | - |

1/ Approximate; includes value of domestic production of boats (except lifeboats) less than 5 gross tons, and outboard motors, which are largely used in pleasure craft.

2/ Exports represent motorboats with engines installed, irrespective of use, and outboard motors.

3/ Outboard motors only, of which 1,166 thousand dollars were exported under lend-lease.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

| Item | United States tariff Act of 1930 | United States tariff 1945 rate | Proposed negotiating country |
|---|---|---|---|
| | Percent ad valorem | | |
| Par. 370 | | | |
| Motorboats, including yachts or pleasure boats, whether sail, steam, or motor propelled, and parts of the foregoing: | | | |
| Motor propelled and other boats: | | | |
| Valued not more than $15,000 each | 30 | 1/ 15 | CANADA |
| Valued more than $15,000 each | 30 | 30 | CANADA |
| Parts of the foregoing: | | | |
| Internal combustion motorboat engines: | | | |
| Carburetor type | 30 | 2/ 17½ | CANADA, UNITED KINGDOM |
| Other (includes diesel and semi-diesel): | | | |
| Weighing not more than 2,500 lb. each | 30 | 30 | CANADA, UNITED KINGDOM |
| Weighing more than 2,500 lb. each | 30 | 30 | CANADA, UNITED KINGDOM |
| Other parts | 30 | 30 | CANADA, UNITED KINGDOM |

1/ Trade agreement with Canada, effective January 1939.

2/ Trade agreement with the United Kingdom, effective January 1939.

## Comment

About 22 manufacturers and 3,000 workers are normally engaged wholly or partly in the production of pleasure boats in the United States. There is also a sizable portion of the domestic engine industry which produces engines for pleasure craft. Motorboats, the outstanding group of pleasure boats, are made in a wide range of sizes from Diesel powered yachts to small boats driven by outboard motors.

MOTORBOATS (PLEASURE) AND PARTS-Continued

Sailing craft, ranging from large schooners to small sailing skiffs, are also produced in substantial quantities. Many small craft such as sailing skiffs, rowboats, and canoes, are now equipped with outboard motors.

Imports of pleasure boats have been limited largely to boats valued at less than $15,000 each--imported chiefly from Canada, Norway, and Sweden. In the past an occasional higher priced yacht was imported from Germany. A small number of engines and other parts for pleasure boats have been imported from the United Kingdom, Switzerland, France, Canada, and other countries. Imports of pleasure boats and parts, by kinds, and by principal sources in 1939 are shown below.

United States exports of pleasure boats and engines exceed imports. For certain types of boats, such as speed and racing boats and small pleasure craft as well as for outboard motors, there is a considerable foreign market. Canada and Latin America are the principal export markets.

During the past 3 years domestic producers have been engaged in the manufacture of war products. With the cessation of wartime activities, a large portion of the industry will presumably revert to the production of pleasure craft. Competition, as in the past, will no doubt come principally from Canada, Norway, and Sweden.

Pleasure boats, sail, steam, or motor propelled: United States imports for consumption, by kinds, and by principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Motor propelled: | | |
| Valued not more than $15,000 each | $61,315 | CANADA, $26,973; Norway, $10,734; Sweden, $5,657. |
| Valued more than $15,000 each | 18,005 | CANADA, $18,005. |
| Other: | | |
| Valued not more than $15,000 each | 58,010 | (Norway, $17,218; Sweden, $14,534; |
| Valued more than $15,000 each | - | ( CANADA, $13,196; UNITED KINGDOM, |
| | | ( $10,082. |
| Total all kinds | 1/ 137,330 | CANADA, $58,174; Norway, $27,952; Sweden, $20,191; UNITED KINGDOM, $10,082. |

1/ Represents the value of 130 boats, as follows: Canada, 71; Norway and Sweden, 13 each; the United Kingdom, 2; and other countries, 31.

Source: Official statistics of the U. S. Department of Commerce.

* * *

Internal combustion motorboat engines and parts for pleasure boats: United States imports for consumption, by kinds, and by principal sources, 1939

| Kind | Total value | Principal sources |
|---|---|---|
| Engines: | | |
| Carburetor type | $88 | CANADA, $88. |
| Other than carburetor type: | | |
| Weighing not more than 2,500 lbs. each | 2,418 | France, $2,398. |
| Weighing more than 2,500 lbs. each | 66, | Switzerland, $66. |
| Total engines | 2,572 | France, $2,398 |
| Other parts | 5,217 | UNITED KINGDOM, $3,392; Germany, $935; CANADA, $598; Switzerland, $272. |

Source: Official statistics of the U. S. Department of Commerce.

BICYCLES AND PARTS

Par. 371
UNITED KINGDOM

Stat. import classes (1939): 7940.1-7940.9

United States production, exports and imports, 1937-39 and 1943

| Year | Production | Domestic exports | Imports for consumption from--- | | | | |
|---|---|---|---|---|---|---|---|
| | | | All countries | UNITED KINGDOM | France | Germany 1/ | Japan |
| | Value (1,000 dollars) | | | | | | |
| 1937 | 32,314 | 227 | 343 | 155 | 7 | 93 | 80 |
| 1938 | n.a. | 179 | 322 | 115 | 5 | 168 | 19 |
| 1939 | 2/22,467 | 297 | 277 | 199 | 36 | 26 | 6 |
| 1943 | n.a. | 3/1,016 | 12 | 10 | - | 4/ | - |

1/ Includes Austria beginning 1938. 2/ Bicycles only, parts not recorded.
3/ Includes bicycles and parts valued at 463 thousand dollars exported under lend-lease.
4/ Less than 500.
Source: Official statistics of the U. S. Department of Commerce.

| Item | United States tariff | | Proposed negotiating country |
|---|---|---|---|
| | Act of 1930 | 1945 rate | |
| Par. 371 | | | |
| Bicycles (with or without tires) and parts: | | | |
| Having wheels in diameter: | | | |
| Not over 19 inches | 30% ad val. | $1.25 ea., but not less than 15% nor more than 30% ad val. 1/ | UNITED KINGDOM |
| Over 19, not over 25 inches | 30% ad val. | $2 ea., but not less than 15% nor more than 30% ad val. 1/ | do. |
| Over 25 inches | 30% ad val. | $2.50 ea. but not less than 15% nor more than 30% ad val. 1/ | do. |
| Frames | 30% ad val. | $1.25 ea. but not less than 15% nor more than 30% ad val. 1/ | do. |
| Parts (except frames and tires) | 30% ad val. | 30% ad val. | do. |

1/ Trade agreement with the United Kingdom, effective January 1939.

Comment

In the United States young people are the principal users of bicycles, but pleasure riding by adults is increasing, and many bicycles are used for messenger and delivery purposes. Most boys wish their bicycles to look heavy and suggestive of motorcycles, and to be fitted with various accessories. Among the features they favor are frames with two top bars, curves in the frame members, "tanks", prominent lamps, carriers over the rear wheel, and instrument panels. Such bicycles are fitted with large balloon tires. There is real need for sufficient ruggedness of construction to withstand the rough usage to which juveniles put their bicycles, but many of these features merely increase the weight for the sake of appearance. Most adult riders, on the other hand, wish their bicycles to be as

light and easy-riding as possible. For this class of riders a light-weight type is made. The frame tubing may be thinner and of high-strength alloy steel, reinforced at the joints. Small, light, high-pressure tires are used. All unnecessary structural members and accessories are omitted. Certain parts are refined and made lighter and more attention is given to good workmanship in the moving parts and the joints. The coaster brake is usually replaced by hand-operated brakes acting on the wheel rims. Two-or three-speed gears are often provided. Such a machine is much easier to ride than the heavy type, and with proper care is equally or more durable. The typical light-weight models weigh from 25 to 30 pounds, the usual heavy type over 40 pounds. Before the war perhaps 3 to 4 percent of the bicycles made in the United States were of the light type. In Canada the demand is divided about equally between light and heavy models. In some parts of Latin America there is a demand for the heavy type, but in the rest of the world the use of the light type is almost universal.

In the United States the demand for bicycles depends on the popularity of riding. About 1899 there was a passing wave which gave rise to a production of more than a million bicycles in that year; 5 years later the output had dropped to a quarter of a million. It remained not much above that level until 1934, when a new and more sustained demand started. The average production in the period 1935-41 was over a million and a quarter units yearly. During the war a simplified "Victory" model was adopted; two manufacturers were allotted quotas totaling 144,000 bicycles yearly. Factory capacity other than for these was converted to war work. The Government in most cases found it best to obtain bicycles for use in Europe from English manufacturers, instead of shipping from the United States. There is now (1946) a large backlog of unsatisfied demand in this country.

There are about a dozen bicycle manufacturers in the United States, no one of which produces more than one-fifth of the total. Most of these firms make only the frames, forks, seat posts, sprockets, and cranks. Some make a few other parts, but all buy many parts from specialty manufacturers. The handle bars and stems, spokes and nipples, and the pedals are made principally by the Torrington Co. One of the leading bicycle makers is a subsidiary of this firm. Two other firms make most of the saddles, three others most of the coaster brakes, and 30 or more others specialize in various parts such as chains and even such small parts as valve stems. Two of the makers of bicycles build light-weight models, but production of this type is a small fraction of their business and amounts to only about $2\frac{1}{2}$ percent of the production of the industry. The lightest of these models are comparable in design and appearance to the English type. About two-thirds of the bicycles are sold through mail-order houses and automobile supply and other chain stores, the remainder through department stores, jobbers, and direct sales to retail dealers. The United States has exported some bicycles to Canada, Cuba, and Mexico, and small numbers to other countries. The weight of American bicycles is a serious handicap in most foreign markets, and before the war exports met severe competition from Great Britain, Germany, and Japan.

For a number of years before the war, the leading bicycle producers were Great Britain, Germany, and Japan. The industries in the United States, Sweden, and Netherlands were much smaller, but by 1936 United States production was close to that of the leaders. Bicycles are made also in France and in various other countries. The product does not demand large capital or extensive manufacturing facilities. Prewar production in the United States ranged from about 1-1/4 to 1-3/4 million bicycles yearly, in the United Kingdom about 2 million, and in Japan about 1 million. Annual production in the Netherlands was from 300,000 to 400,000 in Sweden from 250,000 to 300,000. German production in 1936 was estimated at about 2 million.

The United Kingdom is the largest producer and the principal actual and potential foreign supplier to the United States. The wide use of bicycles in the United Kingdom and in British countries gives British manufacturers a large home and export market. There are reported to be 140 firms manufacturing bicycles

BICYCLES AND PARTS - Continued

and parts and accessories, or assembling from purchased parts. Many of these firms have other activities, some being large corporations making diversified products. One claims to be the largest bicycle producer in the world, with an annual output of 750,000 bicycles. The total invested capital of the whole British industry is said to be about 30 million pounds sterling. Great Britain is also the largest exporter of bicycles. In 1937 more than 800,000 British bicycles were exported, of which nearly 500,000 went to India and British Africa, and 200,000 to other British countries. British bicycles are of high quality and are well received in export markets. In the table below are shown comparisons between United States production and exports and British production and exports, since 1924.

Complete bicycles: United States and United Kingdom production and exports, 1924-45 and January-June 1946

(In thousands)

| Year | United States | | United Kingdom | |
|---|---|---|---|---|
| | Production | Exports | Production | Exports |
| 1924 | n.a. | 7 | 705 | 201 |
| 1925 | 303 | 8 | 640 | 277 |
| 1926 | n.a. | 5 | 680 | 280 |
| 1927 | 255 | 5 | 680 | 283 |
| 1928 | 298 | 5 | 725 | 339 |
| 1929 | 324 | 6 | 840 | 368 |
| 1930 | 285 | 4 | 882 | 247 |
| 1931 | 259 | 1 | 1,000 | 173 |
| 1932 | 194 | 1 | 1,000 | 164 |
| 1933 | 310 | 1 | 1,418 | 205 |
| 1934 | 524 | 1 | 1,836 | 282 |
| 1935 | 653 | 1 | 1,957 | 377 |
| 1936 | 1,250 | 2 | 2,150 | 519 |
| 1937 | 1,110 | 4 | 2,400 | 831 |
| 1938 | 870 | 3 | 2,000 | 576 |
| 1939 | 1,260 | 7 | n.a. | 615 |
| 1940 | 1,290 | 12 | n.a. | 497 |
| 1941 | 1,829 | 28 | n.a. | 345 |
| 1942 | 561 | 7 | n.a. | 107 |
| 1943 | 180 | 21 | n.a. | 112 |
| 1944 | 173 | 1/ 24 | n.a. | 113 |
| 1945 | 555 | 1/ 14 | 1,000 | n.a. |
| 1946 (January-June) | 325 | 1/ 9 | n.a. | n.a. |

1/ Preliminary.

Source: Official statistics of the U. S. Department of Commerce and of the United Kingdom, and estimates from trade sources.

Many of the prewar German bicycles were of good quality and were exported to many countries. The Japanese product was of poor quality and so many complaints were made by foreign buyers that the Japanese Government attempted to enforce standards of quality for the export trade. Japanese exports went mainly to the Orient, although serious efforts were made to establish markets in Western countries. Prices of Japanese bicycles were very low, often one-half to one-third those of American bicycles, but poor quality restricted sales. Some Japanese parts were sold in the United States for replacements or assembly.

Nearly all the bicycles imported into the United States have been of the light-weight type. Imports increased steadily from less than $30,000 in value in 1929 to nearly $400,000 in 1939. Although there was a considerable increase from 1938 to 1939, when the reduced duties went into effect under the British trade

agreement, the increase was not outstanding from the preceding long-term trend, but that fact may have been due in part to the disturbed political and economic conditions in 1939. The duties under the agreement were framed to encourage imports from Great Britain without encouraging further imports of low-priced bicycles from Japan. Up to 1936 imports from Japan had been increasing rapidly, although they had reached only a small value ($116,000) in relation to domestic production. They consisted almost wholly of parts, which could be used as replacements in American bicycles or for assembly. The Japanese industry was then growing rapidly. The provision that the duty should be specific, but not greater than 30 percent nor less than 15 percent, resulted in duties averaging only slightly more than 15 percent on the high-priced British bicycles, but maintained the 30 percent rate on Japanese parts and on potential imports of low-priced bicycles from Japan.

Prior to 1939 Germany usually exceeded Great Britain as a supplier to the United States. German bicycles were of the light-weight type and usually well made. The reduced duties under the trade agreement did not apply to imports from Germany.

During the war imports of bicycles fell to almost nothing. In 1945 British manufacturers began vigorous efforts to sell their light, well-made bicycles in the United States. Imports increased sharply in December of that year, and in the first 9 months of 1946 continued at a rate nearly 5 times as great as in any of the prewar years. In the 3 months July to September, 1946, imports amounted to $600,000. Sales of the imported machines were assisted by the accumulated demand in the United States, which United States manufacturers could not quickly satisfy, by the increased interest in adult riding, with its emphasis on light weight, and by the good workmanship usually found in British bicycles. Import entry papers examined in June 1946 showed that British light bicycles were invoiced at an average of about $26 each. Duty, which at that time, when calculated ad valorem, was payable on an amount which included the so-called "British purchase tax" of about 33 percent, amounted to somewhat over $5. Other charges made the landed cost about $36 each. These bicycles were sold to jobbers at about $44. Heavy American bicycles are sold to jobbers at about $25 each, lighter American bicycles which are now on the market at about $38. The latter, however, are not of as good quality as the best light bicycles made in the United States before the war, which were comparable to the better quality imported. The best American light type, which was made in the United States before the war, is not yet again in production. If priced proportionately to the other models, it probably would be sold at a higher price than the British bicycles. Some lower quality British bicycles are imported at a landed cost of about $30. In this period of great demand and rapidly changing costs and prices, however, price comparisons are not entirely satisfactory.

The following table shows the distribution of imports among the three duty brackets and the ad valorem equivalent of the specific duties.

BICYCLES AND PARTS - Continued

Bicycles: United States imports for consumption, by principal source and duty brackets, 1939

| Duty brackets | Total | | France | | Germany 1/ | | United Kingdom | |
|---|---|---|---|---|---|---|---|---|
| | Number | Value | Number | Value | Number | Value | Number | Value |
| Wheels not over 19 inches in diameter: | | | | | | | | |
| 30% ad val. | 1,321 | $6,375 | 204 | $740 | 405 | $3,192 | 711 | $2,439 |
| $1.25 each (23.4% equiv. ad val.) | 35 | 187 | 13 | 59 | - | - | 12 | 53 |
| 15% ad val. | 142 | 1,879 | 58 | 773 | - | - | 80 | 1,016 |
| Total | 1,498 | 8,441 | 275 | 1,572 | 405 | 3,192 | 803 | 3,508 |
| Wheels over 19, not over 25 inches in diameter: | | | | | | | | |
| 30% ad val. | 9 | 59 | - | - | 6 | 44 | 2 | 10 |
| $2.00 each (17.2% equiv. ad val.) | 505 | 5,872 | 48 | 557 | - | - | 444 | 5,203 |
| 15% ad val. | 1,014 | 16,187 | 29 | 718 | - | - | 946 | 14,597 |
| Total | 1,528 | 22,118 | 77 | 1,275 | 6 | 44 | 1,392 | 19,810 |
| Wheels over 25 inches in diameter: | | | | | | | | |
| 30% ad val. | 708 | 10,546 | 138 | 1,130 | 559 | 9,368 | 2 | 10 |
| $2.50 each (17.9% equiv. ad val.) | 5,271 | 73,571 | 1,088 | 13,767 | - | - | 3,939 | 56,540 |
| 15% ad val. | 3,209 | 69,894 | 173 | 4,237 | - | - | 2,995 | 64,523 |
| Total | 9,188 | 154,011 | 1,399 | 19,134 | 559 | 9,368 | 6,936 | 121,073 |
| Total, all diameters: | | | | | | | | |
| 30% ad val. | 2,038 | 16,980 | 342 | 1,870 | 970 | 12,604 | 715 | 2,459 |
| 17.6% equiv. ad val. (specific duties) | 5,811 | 79,630 | 1,149 | 14,383 | - | - | 4,395 | 61,796 |
| 15% ad val. | 4,365 | 87,960 | 260 | 5,728 | - | - | 4,021 | 80,136 |
| Total | 12,214 | 184,570 | 1,751 | 21,981 | 970 | 12,604 | 9,131 | 144,391 |

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

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